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ABSTRACT

This segment of a series of studies to ascertain the degree to which visually impaired persons use the programs of the Library of Congress National Library Service for the blind and physically handicapped (NLS) describes current issues of concern to the network of local and state libraries serving the target group. Five major issues are examined: programs provided, current and future plans, library administration, reader profiles, and service delivery. Chapters discuss the history and organization of the NLS: research findings on the sponsorship, committed resources, and utilization of the NLS: library administration: issues related to reaching new subscribers: and models of innovative regional libraries, traditional regional libraries, and transitional regional libraries. Tables and figures illustrate the data, a glossary is provided, and a bibliography lists more than 60 references. (FM)

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CURRENT ISSUES IN LIBRARY SERVICES FOR PEOPLE WITH LIMITATIONS IN READING PRINT

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Volume 4

From the series "A Survey to Determine the Extent of the Eligible User Population Not Currently Being Served or Not Aware of the Programs of the Library of Congress, National Library Service for the Blind and Physically Handicapped," Volumes 1-5.

Prepared for the National Library Service.

Marvin Berkowitz, Lorraine G. Hiatt, Pamela deToledo, John Shapiro, Margery Lurie

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The study was conceived in response to the need voiced by concerned individuals at many levels for documented data on the prevalence and characteristics of persons eligible for the alternative reading services provided by the NLS. The NLS, which is administered by the Library of Congress, enthusiastically sought monies to research this issue. We wish to acknowledge the continual support throughout our contract of Mr. Frank Kurt Cylke, Director of the NLS, and especially Mr. Richard Evensen, our project liaison officer at the NLS. Their careful review of the entire study process and the various drafts of this manuscript has resulted in what we hope will be a more useful report.

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INTRODUCTION

This report describes current issues of concern to the network of libraries for the blind and physically handicapped, and is one component of the work funded by the Library of Congress to study the characteristics of persons and institutions eligible to use the National Library Service (NLS/BPH).*

Following the pattern of development of libraries for the general population, the growth of special libraries for people unable to use regular print has been uneven. Wide variations in geographic location, size, the nature of collections, as well as in circulation policies and the range of services to readers are apparent for both types of libraries. When the service began in 1931, special library materials were provided solely to adults recognized as "legally blind". Nearly thirty-five years later, these services were extended in 1966 to all persons with physical impairments who were unable to read regular print. In some states special libraries were established for non-print materials, while in others braille matter was added to the print collections by public libraries to meet the requests of local blind readers.

As of September 1979, a coordinated network of 159 local and state libraries disseminated recorded and braille materials and equipment largely provided by the NLS.* Large print materials are also available through some network libraries, but more commonly, large print is supplied through local public libraries.

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*The National Library Service for the Blind and Physically Handicapped, (NLS/BPH which we sometimes shorten to NLS), is the name of the federally funded unit in Washington, D.C. that is administered by the Library of Congress. Until 1978, the NLS/BPH was known as the Library of Congress, Division for the Blind and Physically Handicapped (LC/DBPH).

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It is difficult for any sample of a small population to be representative of that population. From the population of 56 regional libraries situated in 48 states and the District of Columbia, NLS/BPH suggested that the heads of regional libraries in twelve designated states could give views that would reflect the national picture. Regional librarians in four additional states were also interviewed to match the location of site visits to health care facilities, made as another component of the study. The resulting sample of regional librarians in sixteen states represents one-third of all states with special libraries for persons with reading disabilities. Interviews were conducted with librarians in three northeastern states, six southern states, five north-central states, and two western states. The libraries ranged from the oldest providers of braille collections to those that are only six years old. Five libraries were of pre-1931 origin (before the establishment of the national library system), two were set up between 1931-1949, five were established between 1950-1969, and four were set up since 1970.

Five major issues were examined in telephone interviews lasting about two and a half hours each. These were: programs provided, current and future plans, (library administration), reader profiles, and service delivery. The limitations of a small sample of interviews versus a larger sample of on-site observations and inquiries must be recognized. It is the authors' concern that this study may tend to overemphasize issues perceived by the respondents as immediate difficulties, and thereby under-report overall trends for a smoother, more effective service delivery. An attempt was made to alleviate this concern by supplementing the interviews with extensive review of available literature on NLS/BPH and related services.

The resulting data provided AFB research staff with background information for the larger study, but also stands alone as a description of issues in the operation of regional libraries. The significance of this report as a separate document derives from the general absence of literature on regional libraries involved in the distribution of NLS services. The specific findings describe factors involved in variations in usership, and suggest alternate strategies for bringing services to eligible non-users.

Coincident to the time this sub-study was being conducted, the American Library Association (ALA) was undertaking the preparation of new draft guidelines for operation of the network libraries. It was reassuring to the AFB staff that its work, conducted independently, touched on many of the same points as the ALA guidelines, which are presented briefly without discussion. This sub-study may suggest modifications to specific ALA standards. The findings may also be useful as an indication of problems identified prior to implementation of guidelines--a statement of views at one point in time, against which later developments can be compared. In presenting the material obtained, efforts were made to integrate data or difficulties identified by the librarians, and plans for alleviating many of these difficulties.

Finally, this report reflects the interest of the regional library network in assessing itself in order to explore how readership can be expanded and served. It became apparent during the survey that current problems of one state had often been effectively resolved in others, and that this information was generally unavailable or not being used. Therefore, the material is presented with an eye to providing some feedback to the network which , hopefully, will be adopted or used by audiences at the federal, state, and local levels. Many of the issues identified lie within federal mandate and authority; other issues are within the state librarians' purview. However, it must be pointed out that most factors represent multiple level policy decisions. In this context, the findings strongly indicate the interest in and need for increased coordination, cooperation and communication among providers of materials and equipment at the national level, and the directors of state offices of education, state library systems, state commissions and other administrative departments who also determine the quality and extent of reading opportunities for handicapped persons.

CHAPTER 1

BACKGROUND

HISTORY OF THE NATIONAL LIBRARY SERVICE

The expansion of special library services for persons unable to use regular print has paralleled that of U.S. social services in general, and regular print libraries in particular: limited development in the early 1900's, introduction of direct government involvement in the 1930's, expansion of mission in the 1960's, and trends toward administrative reforms and consumer involvement in the 1970's. Some significant dates in the development of the National Library Service are given below.

Pre-NLS/BPH - The earliest special reading services to persons unable to use regular print were provisions of large print, raised print, and braille materials.

In 1879, Congress authorized the American Printing House for the Blind (APH) to produce textbooks in raised type for blind school children, and designated APH as the supply house through which state departments of education should order books with their quota of federal dollars for educating each blind child. Teaching tactual reading created a formal demand for alternatives to print books.

Tactual reading media require significantly more paper and are more costly to produce than regular print; for example, a braille version of a book is generally 20-30 times larger than its regular print form. Consequently, in 1904, free mail services for books loaned to the blind provided a stimulus to libraries to expand their braille collections and to lend them more widely, often to more distant, less mobile readers.

While print collections expanded rapidly in a growing library network in the early 1900's, public libraries struggled with a wide variety of braille and raised type styles that were used by the blind. During this time period no single set of rules for braille format and contractions had been agreed upon. In 1917, when grade 1½ braille was adopted as the standard for instruction among the blind school children, and gained subsequently wide use, a major obstacle to the provision of non-print matter was eliminated. (Grade 1 braille and other tactual reading systems, such as "moon type," continue to be used by some readers.)

NLS/BPH - In 1931, after years of heated debate among the major agencies for the blind as to which organization would prepare and distribute federally financed reading materials for adults, the Pratt Smoot Act (PL 71-787) was passed by Congress. This provided the Library of Congress with $100,000 a year for purchase and publication of books for the adult blind. It authorizes the Librarian of Congress to arrange with public or other non-profit libraries, agencies, or organizations to act as regional or local centers for circulation of books under regulations and conditions as he might prescribe.

In 1934, with the advent of the 33 1/3 rpm phonograph record, spoken versions of print matter called Talking Books and record players were added to the program. Equipment distribution and repair now became important issues. The cost of producing Talking Books was significantly reduced with the subsequent adoption of slower recording speeds (16 2/3 rpm, 8 1/3 rpm) and with the utilization of open reel tape in the 1960's, and more recently with the introduction of cassettes.

In 1966, Congress passed legislation extending the service to include persons of all ages who have physical disabilities that prevent the use of regular print. Attendance to the reading needs of persons unable to hold materials, to turn pages, or to use conventional print in a normal way, now became of greater concern.

ORGANIZATION OF THE NATIONAL LIBRARY SERVICE

The Coordinated Library Network

Public Law 89-522 provides the legal mandate under which the National Library Service now operates. (See Appendix X.2 for the precise enabling legislation.) It authorizes the establishment of a decentralized library system in which:

1. A central office (NLS/BPH, Washington, D.C.) sets policy, including standards of eligibility, selects and arranges for preparation of materials and equipment, coordinates interlibrary exchanges, performs research and necessary administrative service, provides bibliographic assistance, and offers reference service. NLS/BPH, Washington is entirely federally funded. During the period of this study (1977-1979), the allocation of federal monies has increased by nearly 50%, from $22 million in FY 1977 to $36 million in FY 1979. The 1979 budget included the preparation of about 1,000 copies each of some 1,700 recorded titles,* the preparation of 84 copies each of nearly 400 braille titles, and the purchase of more than 160,000 new record and cassette players.
2. A network of "regional" and "subregional" libraries, designated by the states, determine eligibility for service, distribute materials purchased by NLS/BPH, Washington, and others produced by themselves to eligible subscribers, and administratively operate the program for their geographic

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*By comparison, about 40,000 print titles are made available to the general public each year.

areas. In the fiscal year 1978, state funds accounted for some 67 percent of the $14 million operating budget of the regional and subregional libraries. Federal monies acquired primarily through the Library Services Construction Act* (LCSA), the Comprehensive Employment and Training Act (CETA), and the Social Security Act provided nineteen percent, city and county funds made up about ten percent, gifts and bequests added four percent, and other sources supplied less than one percent.

The coordinated library network has flourished. From the original eighteen libraries selected to distribute NLS/BPH materials in 1931, the number has grown to 159 regional and subregional lenders in 1979. In the past 47 or so years, circulation has increased from approximately 50,000 items to more than 14 million items.

Generally, one library is selected in each state as a regional library; however, in two states there is presently no regional library, and in five others there are two regional libraries. In addition to designated regional libraries, any local public library or other organization serving more than 200 readers may apply to become a subregional library for residents in its surrounding area (usually counties). As of September 1979, subregional libraries had been established in twenty-two of the states.

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*Administered by the U.S. Department of Health, Education and Welfare for innovative projects.

The rapid growth of subregional libraries is perhaps the most significant innovation in service in the last ten years. As of 1979, subregional libraries had been established in twenty-two states. With this shift towards further decentralization, the state regional libraries coordinate the local units--even though they may have no funding or managerial responsibility for them.

In one state studied, although there are seven subregionals already affiliated with the regional library, there is a desire to establish more. Here, the regional library's role is to provide backup rather than direct services, and to provide an enhanced interlibrary loan capacity by quickly locating materials unavailable at a subregional library.

The choice to establish subregional libraries has been based on local considerations of size and dispersion of state populations, the number of handicapped individuals, the interest in reading expressed by state residents, the strength of local consumer groups, and state priorities for library, social and health care services in general. But regional librarians are now asking the standard questions concerning the decentralization of a public service that have troubled public administrators in other services over the years. For one example, the advantages of serving walk-in users must be compared with the effect on users who are less mobile or more dependent upon the mail.

In the last four years, NLS/BPH has also contracted with and funded four multi-state library centers to serve as material support units for approximately eleven to fourteen states each. The multi-state centers distribute materials, provide back-up machine distribution and repair, and coordinate volunteer recording efforts. The present centers are located in the same cities as the regional libraries; however, they are operated separately.

Subscription to the National Library Service

An individual with a reading disability usually becomes aware of the National Library Service through friends or relatives. Subscription to a regional or subregional library can be conducted by mail or in person, contingent on establishing proof of eligibility. The subscriber registers for Talking Books, braille, or both. Readers of Talking Books receive, normally through the mail, record and/or cassette players, and requested accessories. The national unit mails out two bimonthly publications to requesting subscribers, as appropriate, called Talking Book Topics and Braille Book Review. These publications describe newly available books and magazines. The subscriber may then order materials by telephone or mail. Materials are received from and returned to the regional or subregional library by a free mail program. Broken machines may also be returned for repair by mail. At no time need the user incur any personal cost.

CHAPTER 2

RESEARCH FINDINGS

SPONSORSHIP, RESOURCES COMMITTED AND UTILIZATION OF THE NATIONAL LIBRARY NETWORK

Sponsorship

One result of decentralization of authority and funding for the regional libraries has been to permit states to develop library services consistent with local needs and priorities. The diversity of views concerning these issues appears to result in patterns of staffing and funding for the libraries that are not clearly related to sponsorship, population size or density, regional setting, or to relative interest in reading.

Table 2-1 provides data on the number, sponsorship, and organization of regional and subregional libraries within the states studied. In most states, the regional and subregional libraries fall administratively within the state library system, which is generally subsumed by the state department of education; but they may also be sponsored by the state department of culture, the secretary of state, or may report directly through a board to the governor or state legislature. Some regional libraries are administered by state divisions of blind services or are under a county or city library system. Hence, for the libraries studied, over two-thirds of the libraries were affiliated with their state library system: six percent were affiliated with a public library, while 13 percent were sponsored by both state and public libraries; one regional library was sponsored by a private non-profit organization.

Half of the states have subregionals, half do not. Two states have seven subregionals, one has six. In sum, the number of sub-

Table 2-1

Organization of Services of Selected NLS/BPH Libraries - 1977

				LIBRARY ORGANIZATION WITHIN STATE		
State No.	Census* Region	NLS/BPH Region	State Population Size	No. of Regionals	No. of Subregionals	Structure
1	North-east	North	Small	1	0	Regional within local public library within state library system.
2	North-east	North	Small	1	5	Regional within state library system--subregionals within local systems.
3	North-east	North	Large	2	2	One regional within city system, the other within state library system--subregionals within county/state system.
4	South	South	Medium	1	0	Regional within state library system within Department of Culture.
5	South	North	Small	1	0	Regional within public library system.
6	South	South	Medium	1	0	Regional within state library system within Department of Cultural Resources.
7	South	South	Medium	1	0	Regional within state library services within State Department of Education.
8	South	South	Medium	1	6	Regional within Division of Blind Services within Department of Education--subregionals within city or county public library system report to Department of State.
9	South	South	Small	1	4	Regional within state library system within Department of Education.
10	North Central	West	Small	1	0	Regional within state library system reporting to Department of Education and Cultural Affairs.
11	North Central	Midlands	Medium	1	1	Regional within city public library within State Department for library services within Department of Education.
12	North Central	Midlands	Large	2	0	Regionals within city public libraries within state libraries.
13	North Central	Midlands	Small	1	7	Regional within state library system--subregionals report to public libraries.
14	North Central	Midlands	Large	2	7	Regionals within state library services within Department of Education.
15	West	West	Small	1	0	Regional within local public library within state library system.
16	West	West	Large	2	2	One regional within private non-profit organization, the other in state library system--subregionals within city/county system.

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*Paralleling designations used in other sections of the study, Census regions are used. These convert to Library of Congress NLS/BPH regions roughly as follows: Northeast = North, South = South, North Central = Midlands, West = West. See the main report for area maps.

regionals does not seem related to type of administrative sponsor of the regional library in each state. Only a quarter of the libraries surveyed were housed in free standing, single occupant facilities; more than half were housed in a public or state library.

Funding and Staff Inputs

Reflecting the national pattern, the regional and subregional libraries studied are funded by widely varying sources. In one state, for example, there were two large regional libraries and two subregionals in 1977. One of the regional libraries, located in a private non-profit agency, is supported from gifts and bequests, while the other received money from the state's general fund. One of this state's subregionals is a county library that applied for and received a federal grant through the Library Service Construction Act (LSCA), (which is administered by the U.S. Department of Health, Education and Welfare for innovative projects), and obtained matching county money. The other subregional is a city sponsored public library that used city tax monies and federal funds for staffing through the Comprehensive Employment Training Act (CETA).

Table 2-2 presents data on two gross measures of resources committed to operating the library service in fiscal 1977: (a) dollars committed to state NLS services per eligible state resident, and (b) eligible state residents per full-time equivalent staff member.* Excluding one state,**

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*These data are presented tentatively as gross measures of service. Funding and staffing data from telephone interviews with regional librarians have been checked with materials from NLS/BPH and seem to be largely in the appropriate ranges. However, they may not precisely account for CETA funds and CETA funded positions, full-time equivalency in staffing, the payment of rents for the library, and for the relative use of volunteers. Data on numbers of persons eligible for the NLS/BPH service in each state were calculated from regional prevalence rates determined in other components of the study.

**Data from this library was not included because its director indicated that the funding and staffing levels for 1977 have subsequently been cut back significantly.

Table 2-2

Estimated Measures of Resources Committed to Selected NLS/BPH Libraries - FY 1977

State No.	Census Region	NLS/BPH Region	State Population Size	Measures of Resources Committed to State Network[a]: Dollars per Eligible Resident	Measures of Resources Committed to State Network[a]: Eligible State Residents per paid Library Staff (in 1000s)[b]
1	North-east	North	Small	2[d]	3
2	North-east	North	Small	10	1
3	North-east	North	Large	4	5
4	South	South	Medium	3	3
5	South	North	Small	24[e]	4
6	South	South	Medium	5[d]	3
7	South	South	Medium	3	5
8	South	South	Medium	6	2
9	South	South	Small	9	2
10[c]	North Central	West	Small	8[e]	2
11	North Central	Midlands	Medium	6[e]	4
12	North Central	Midlands	Large	4	4
13	North Central	Midlands	Small	8	2
14	North Central	Midlands	Large	4[d]	4
15	West	West	Small	9[d]	3
16	West	West	Large	4[d]	4

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[a] Includes regional and subregional libraries.

[b] Number of eligible persons estimated from the regional prevalence rates.

[c] Covers two states.

[d] Significant growth in FY 1978.

[e] Significant decline in FY 1978.

the annual outlay for network library services averages about $4 per eligible person; the average ratio of eligible persons to paid library staff is roughly 2,500 to 1.

Wide fluctuations in these measures of inputs appear across the states that are illustrated in Figures 2-1 and 2-2. Outlays per eligible person range mainly from about $2 to $10, with the higher figures found in the small and moderately populated states, especially those with low population densities. Nearly 70% have an average outlay of less than $8 per year per eligible person. Here the ratio of eligible state residents to full-time equivalent staff ranges broadly too, from about 500 - 5,000 to 1. The client-staff lower rates are generally found in the medium and small states. These findings are logical because certain minimum levels of staffing and budget are necessary to house and operate a collection--irrespective of the number of readers. Beyond the base operational costs, states supply additional support, depending on community interest in reading, social services, local pressures and, of course, the enthusiasm and capabilities of key library officials.

Comparative analyses of the sources of funding are complicated because in a number of states the origin of monies is unclear. For example, the state library may apply for LSCA, CETA, or Social Security Act funds, and these are added to the state library's general fund, a portion of which is then allocated for operating the braille and Talking Book program. In one case, the State Commission for the Blind supplies federal vocational rehabilitation funding to the NLS library

Figure 2-1

Funding per Eligible State Resident--
Distribution of States by Outlays to Operate NLS/BPH Libraries
per Eligible State Resident (FY 1977)

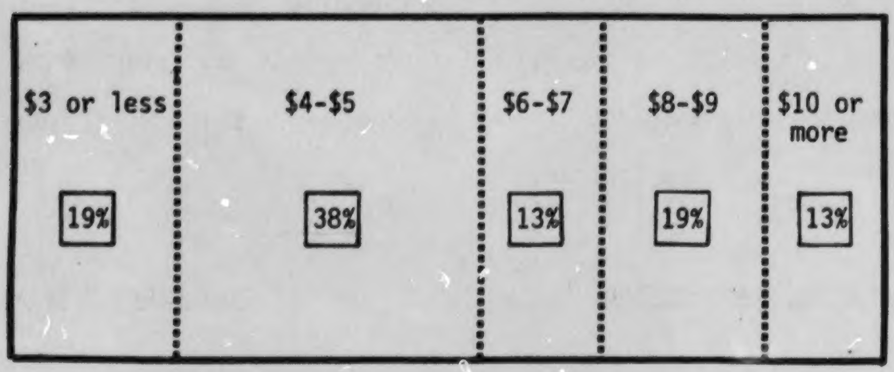
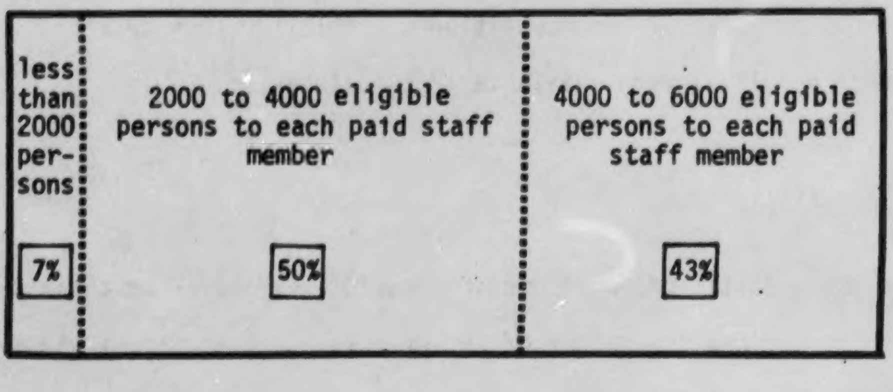


Figure 2-2

Client-Staff Ratio (in 1000s)--
Distribution of States by Ratio of Number of
Eligible State Residents to Paid NLS/BPH Library Staff (FY 1978)



for the operation of a radio information service, and for braille transcription and taping. Whether the source of these dollars is reported as federal or state is uncertain. Nevertheless, the data grossly illustrate varying commitments of tax support for the fiscal year 1977. The funding situation has improved markedly for some states in the last two years, but for others it has deteriorated. Hence, the data should be viewed as a reference point with no greater significance applied.

Issues in Measuring the Utilization of the National Library Service

Many regional librarians are concerned about whether the activity and quality of their services compare favorably with programs in other states. A previous section of this report provided comparative data on two measures of resource inputs committed to the regional libraries --Dollars expended per eligible state resident, and Eligible residents per paid library staff. This section takes up the issue of measuring library activity or utilization. Two global output measures in current use are examined--media participation and circulation. Few solid estimates of the size of the population eligible for service at the state or regional level were available to the libraries.

Media Participation

Media participation (sometimes confusingly referred to as "readership") describes the number of subscribers using different kinds of materials--i.e., Talking Books on records, Talking Books on cassettes and open reel tape, or braille. (Large print usage is not reported nationally.)

by NLS/BPH to collect and prepare data, it is not possible to determine clearly how many individual subscribers or readers there are: this is complicated by the fact that it is usual for a subscriber to utilize more than one media for reading.* For example, in 1978, nationally there were an estimated 400,340 users of Talking Book records, 216,660 users of Talking Books on cassette and open reel tape, and 20,260 users of braille. But the total number of subscribers was probably somewhere between 400,340 and 637,260 (i.e., between the minimum possible readership and the sum of participation in the three media, which is also the maximum possible readership if each subscriber used only one medium).

National data show that the number of persons listening to records (having a record player) is over twice that listening to tapes (having a cassette player). Only four percent of the total media use in 1978 was in braille. The rapid expansion of the number of cassette players being distributed is reflected in a 32% increase in the deployment of cassette players from 1977 to 1978. The number of persons using records grew four percent over that period.

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*One of the problems is that a uniform registration and subscriber information system does not appear to be in use across the country. In one attempt to account for this condition, the study explored whether national data on subscription to the Talking Book Topics (TBT) and Braille Book Review (BBR) could be used as an index of readership. About half of the thirteen state directors interviewed felt that a list of readers from TBT and BBR would offer a good basis for judging current readership. But some foresaw complications due to ways in which the lists are formulated and maintained. For example, one librarian felt that there were more people on TBT and BBR listings than there were actual readers, because copies are still sent to deceased persons. Others estimate that they have more subscribers than would be listed on TBT and BBR labels, due to a variety of factors. All but one of the states automatically place new readers of Talking Books on the TBT list; one library only puts people on the list if they request it. Similarly, for those states that directly serve their own residents with braille (80%), BBR is provided in most states on an "as requested" basis. In the other 20% of the states, the BBR is sent automatically when an individual requests the braille program.

Circulation

Circulation describes the number of books, magazines, or sheet music scores sent to individual subscribers or deposit collections. National circulation data for 1978 reflect the concentration of program use in listening to Talking Books rather than reading braille. Of the estimated 14 million books, magazines and music scores circulated, 78% were in the form of records, 18% were cassettes, and four percent were in braille. Thirty-six percent of the recorded materials circulated were magazines distributed on flexible discs. Reflecting the expansion in the preparation and distribution of cassette players and Talking Books on cassettes, use of cassettes increased by 49% between 1977 and 1978. Braille utilization also increased by approximately 7%, due largely to a doubling of the number of magazines distributed to subscribers of braille. Use of Talking Books on hard discs remained more or less stable. Particicipation in media use includes subscribers receiving materials directly from the regional or subregional libraries, and an estimate of the number of persons borrowing materials from "deposit collections" or

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*Some problems are found in interpreting the published circulation statistics. Here, for example, the reported wide-spread practice of mailing out examination copies of books to subscribers based on reader interest profiles tends to inflate data on actual reading. Although scanning material is an essential element in deciding whether a book is of interest, the number of books scanned is not necessarily equivalent to the number of books read. Hence, circulation becomes an unclear term.

mini-libraries in health care facilities, schools, and rehabilitation settings.* The number of individual subscribers relative to users of deposit collections varies by media type: the ratio is approximately 3:2 for records and cassettes, and 7:3 for braille. Circulation to individual subscribers from regional libraries makes up about 62% of the total national reading. Circulation of magazines on thin discs or braille direct from the producer (to reduce delays) accounts for about 34% of reading.** Circulation to deposit collections accounts for three percent, and loans between regional libraries that are facilitated by a central catalogue prepared by NLS/BPH make up one percent.

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*Ambiguity also exists with regard to the number of users of deposit collections (mini-libraries) located in institutions, which puts the media participation data into further question. NLS/BPH has taken as a rule of thumb that each institutional deposit collection has an average of ten users; but the AFB study team found (on the basis of site visits reported on in another component of this study) that for the vast majority of residential institutions, the 1:10 ration probably far exceeds actual use. Typically, there were no more than two to four regular users of Talking Book machines at any of the deposit collection sites visited across the country, representing a rate of use of approximately .7 regular or occasional users of each deposit collection machine, and .8 users of each individually assigned machine (based on 44 health care institutions, and excluding schools for the blind). Another problem here is that readers in institutions who subscribe to the National Library Service and receive materials as individuals are also frequently included by institutions as users of their deposit collections: this practice results in an overestimate of institutional usage.

**Additional magazines, not prepared by NLS/BPH, are distributed by the regional and subregional libraries themselves, but the vast majority of magazines are distributed directly by the producers of thin discs.

Utilization Levels in Regional Libraries

Media participation and circulation data for the regional libraries included in this study are given in Tables 2-2 and 2-4. In general, within broad ranges these data reflect the national pattern just described. The data suggest that some states have a much more active braille reading population than others, and that some states appear to be converting from Talking Books on records to Talking Books on cassettes much more rapidly than others. Data in Table 2-4 show that some states have a much more active deposit collection readership than others, relative to their total programs.

Two additional measures of activity or output are presented in Table 2-5. These are: total media participation per 100 state residents eligible for the NLS/BPH program, and the ratio of circulation to media participation. Despite possible double and triple counting in the media participation data, these output measures are useful in comparing state activity. The utilization measures show that "total circulation" ranges from ten to forty times "total media participation." In four states circulation is between 10 and 19 times media participation, in five states circulation is between 20 and 24 times media participation, in three states between 25 and 29 times, and in four states between 30 and 40 times. Obviously, some states have much more avid readers and more active library staffs than others for introducing subscribers to books and magazines.

The second point to note from the utilization data is the level of the rates of media participation per 100 eligible state residents. In effect, these rates reflect the maximum percentage of the eligible population that is currently being reached by the NLS/BPH program.

Table 2-3

Components of Media Participation and Circulation by Type of Media - 1977

State No.		Percent of Media Participation		
		Talking Book[a] Records	Talking Book[b] Cassettes	Braille
1				
	A. Media Participation (persons)	83	15	2
	B. Circulation (volumes)	84	10	6
2				
	A. Media Participation (persons)	75	25	1[d]
	B. Circulation (volumes)	89	10	1[d]
3				
	A. Media Participation (persons)	79	19	2
	B. Circulation (volumes)	87	8	5
4				
	A. Media Participation (persons)	67	30	3
	B. Circulation (volumes)	85	10	5
5				
	A. Media Participation (persons)	46	51	3[d]
	B. Circulation (volumes)	79	14	7[d]
6				
	A. Media Participation (persons)	63	32	5
	B. Circulation (volumes)	79	15	6
7				
	A. Media Participation (persons)	77	20	3
	B. Circulation (volumes)	87	10	3
8				
	A. Media Participation (persons)	63	34	3
	B. Circulation (volumes)	86	12	2
9				
	A. Media Participation (persons)	77	21	2
	B. Circulation (volumes)	87	10	3
10[c]				
	A. Media Participation (persons)	57	43	2[d]
	B. Circulation (volumes)	79	19	2[d]
11				
	A. Media Participation (persons)	78	19	3
	B. Circulation (volumes)	84	10	6
12				
	A. Media Participation (persons)	68	27	5
	B. Circulation (volumes)	84	10	6
13				
	A. Media Participation (persons)	71	28	1[d]
	B. Circulation (volumes)	84	14	2[d]
14				
	A. Media Participation (persons)	63	30	7
	B. Circulation (persons)	85	10	6
15				
	A. Media Participation (persons)	67	29	4
	B. Circulation (volumes)	86	11	3
16				
	A. Media Participation (persons)	64	31	5
	B. Circulation (volumes)	81	13	6
	TOTAL U.S.			
	A. Media Participation (persons)	68	28	4
	B. Circulation (volumes)	82	13	5

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[a] Includes thin discs sent out as magazines.

[b] Includes less than 1% open reel tape.

[c] Regional library services two states.

[d] Braille readership in the state is serviced by a regional library outside of the state.

Source: calculated from NLS/BPH, "Readership and Circulation" in Libraries for the Blind and Physically Handicapped, 1977.

Table 2-4

Distribution of Media Participation and Circulation Between Individual Subscribers and Deposit Collections - 1977

				Percent of Total Media Participation		Percent of Circulation[a]		
State No.	Census Region	NLS/BPH Region	State Population Size	Individual Subscribers	Deposit Collections	Books[b] to Individual Subscribers	Books to Deposit Collections	Direct Circulation of Magazines to Individuals and Deposit Collections[c]
1	North-east	North	Small	44	56	61	3	36
2	North-east	North	Small	72	28	58	2	40
3	North-east	North	Large	52	48	60	2	38
4	South	South	Medium	59	41	49	2	49
5	South	North	Small	77	23	41	19	38
6	South	South	Medium	68	32	66	2	32
7	South	South	Medium	66	34	63	2	36
8	South	South	Medium	71	29	61	2	37
9	South	South	Small	54	36	67	2	30
10[d]	North Central	West	Small	93	7	61	1	38
11	North Central	Midlands	Medium	70	30	61	--	39
12	North Central	Midlands	Large	59	41	62	3	35
13	North Central	Midlands	Small	57	43	64	2	33
14	North Central	Midlands	Large	52	48	60	3	37
15	West	West	Small	65	35	66	2	32
16	West	West	Large	66	34	64	2	34

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[a] Interlibrary loan, which makes up less than 1% of circulation excluded except from state 5 (2%), state 8 (1%), and state 13 (1%).

[b] Includes music scores but not large print.

[c] Based on the assumption of ten readers for each book or magazine sent to a deposit collection.

[d] Covers two states.

Source: calculated from NLS/BPH, "Readership and Circulation" in Libraries for the Blind and Physically Handicapped, 1977.

Table 2-5

Measures of Utilization in Regional Libraries - 1977

State No.	Census Region	NLS/BPH Region	State Population Size	Ratio of Total Circulation to Media Participation	Media Participation Per 100 State Residents Eligible for NLS/BPH
1	North-east	North	Small	13	48
2	North-east	North	Small	31	36
3	North-east	North	Large	19	27
4	South	South	Medium	19	17
5	South	North	Small	10	[a]
6	South	South	Medium	25	19
7	South	South	Medium	32	14
8	South	South	Medium	28	29
9	South	South	Small	22	31
10[b]	North Central	West	Small	41	20
11	North Central	Midlands	Medium	27	19
12	North Central	Midlands	Large	21	20
13	North Central	Midlands	Small	20	37
14	North Central	Midlands	Large	23	21
15	West	West	Small	30	24
16	West	West	Large	23	20
TOTAL U.S.				23	22

[a] Data seem questionable.

[b] Covers two states.

Source: calculated from NLS/BPH, "Readership and Circulation" in Libraries for the Blind and Physically Handicapped, 1977.

About 25% are serving at maximum between 10% - 19% of their eligible populations, about 60% are serving between 20% - 29%, and 15% are serving over 30%. More accurate estimates of the eligible population being served from these data would probably be on the order of half of the above percentages to reflect double counting in the media data and ambiguity in the size of the institutional population reflected as being served. Nevertheless, significant differences do appear.

No clear statements, however, can be made about how the two activity/utilization measures presented vary with region, state population size, number of subregional libraries, sponsorship, funding, or paid staff. These factors seem to interact. Indeed, the purpose of the subsequent sections of this study is to explore what programmatic and administrative elements in operation of the regional libraries may account for these observed differences in utilization.

Remaining Questions on Sponsorship, Funding, and Utilization of the National Library Network

In the process of analyzing ways in which service delivery may affect use of NLS programs, a number of issues were raised by regional librarians. During the analyses of these data, questions emerged which could not be resolved within the scope of this study. To facilitate review, the questions are placed at the end of each major section. Some of these questions may have already been answered, others may require research, still others may need clarification based on other available information. A large number of these issues have been addressed by the draft guidelines prepared by the American Library Association.

The responsibility for resolving these issues rests with no single level of service: some may have to be handled on a state-by-state basis, others might receive coordinated response between state and national programs. It is clear to us that responses to these issues, communicated through the library network, may help in improving overall services to NLS readers.

Organizational and Funding Issues - The following major issues were raised with regard to regional library services and their organization:

1. Is there an ideal organizational placement of the regional library within the state or local government structure?

2. Should states attempt to agree upon a minimally acceptable set of goals and specific objectives for their regional libraries?

3. Are there minimally acceptable standards of funding and staffing for regional libraries?

4. What should the role of NLS/BPH be with regard to the apparent problems faced by some libraries in developing long range plans for services?

5. What experiences from the development of subregional libraries might be shared to determine their impact, to shape their growth, and to assist states considering the establishment of these units?

   a. Are basic parameters or standards appropriate for subregionals beyond what is already specified by NLS, and if so, what should these include?

   b. What will the growth of subregionals mean to the image and funding potential of the regional library stystem?

   c. How can training be best organized to help staff in the subregionals attain a maximal level of effectiveness?

6. How will the radio reading services be best co-ordinated with regional and subreaional libraries?

7. With the variety of services of funding and staffing utilized in the network libraries, how can more meaningful and consistent measures of service be regularly prepared that would consider:

   a. Source of all funding (by type and amount)?

   b. Number of staff formally assigned to regional and subregional libraries?

   c. Number of personnel providing services through CETA, SSA, LSCA, and state or local library programs?

   d. Number of full-time equivalent volunteers?

   e. Population eligible for service?

   f. Would it be possible to develop reporting cycles that would be useful both in terms of state budget report schedules and NLS/BPH time frame requirements?

8. Is there any way to more accurately tally circulation statistics for those readers who have books sent to them. What hard data can be developed on:

a. Use of machines by type (to include data on individuals who have both cassette and record players)?

b. Frequency of use of deposit collection materials?

c. Actual use of deposit collection machines (perhaps by setting one week per year for surveying use statistics)?

PROGRAMMATIC FOCUS OF REGIONAL LIBRARIES

The way in which regional librarians viewed their responsibilities was considered as an important indication of how they broached expanded utilization of the service. Consequently, the program objectives of the regional librarians were explored within the overall goal of distributing reading materials. As might be expected, nearly all of the librarians referred to the importance of sound administration and distribution management for expanding readership and circulation. However, only half of the librarians identified these issues as paramount. The remaining half focused on personal service, such as advising individual readers on book selections and outreach programs.

Interestingly, most librarians had difficulty readily identifying goals and objectives as such; that is, it seems that most goals are implicitly rather than explicitly aimed at. Some sample comments illustrate the diversity of perceptions:

Personal Service Objectives

My primary objective is service to children and schools...to provide personal services.

We believe in the services provided by the librarian...librarians do about 65% of the topic selection for our patrons. Outreach and direct service are characteristic of our service.

Administrative Objectives

With our heavy emphasis on subregionals...we are evermore serving as a library for librarians: taping, handling master files, repairing machines.

We have an automated circulation system which mechanizes the individual's preferred style of obtaining materials and aids in the selection process ...we wonder whether this doesn't change our services by making them seem more impersonal.

All the regional librarians perceived their services to subscribers as going beyond disseminating materials. As shown in Table 2-6, reader services in three-quarters of the libraries include volunteer recording, machine lending, information and referral or reader advisory services, braille collection and distribution, and free or collect telephone calling privileges. Machine repair and distribution of large print material is available in slightly over half of the libraries.

Reader services are often available within a particular state, but are not coordinated by that state's regional library. Braille readers, for example, may correspond directly with another state's regional library to acquire materials. Machine distribution and repair may be handled by staff or volunteers who have formal ties to the library but are affiliated with an organization for the blind.

In some instances, regional libraries sponsored by the state library system were modeled very closely after print collections; in other cases, the regional libraries described themselves as little affected in policy or program by activities of the state library system. There did seem to be some tendency for the regional libraries affiliated with local public library services to maintain greater involvement with personal readership services. Overall, the commonality of a large number of programs and concerns suggests that sponsorship or affiliation appeared less important in determining the nature and scope of services to subscribers than did funding and budgetary procedures, staffing and facilities. A few particulars follow.

Telephone Services - Free telephone calling services are now available in about 80% of the libraries studied, and have removed the obstacles of the reduced mobility of disabled persons and distant location sub-

Table 2-6

Reader Services Commonly Available at Regional Libraries

Service	Percent of NLS/BPH Libraries Offering Service*
Distribution of Recorded and Disc Material	100
Reader Advisory Services	100
Recording of Print Materials by Volunteers	87
Loan of Players and Accessories	81
Information and Referral/References	81
Transcription and Distribution of Braille	75
Provision and Distribution of Large Print	62
Free Telephone Services	
a) No Charge Long Distance Call-in (800#)	56
b) Collect Calls Accepted	25
Maintenance of Players and Accessories	56
Automated Ordering of Materials	50
Innovative Programs	
a) Direct Service to Institutions	**
b) Personal Visits to New Patrons	**
c) Development of Handbook on Services for Nursing Homes	**
d) Film Lending	**
e) Book Talk Radio Show	**
f) Recorded Information on Phone	**
g) Create Large Print	**
h) Print Collection on Disabilities	**

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*Percents based on 16 NLS/BPH libraries from 16 states; multiple responses were common.

**Typically mentioned by one or two librarians.

scribers. WATS lines and 800 numbers appear to have brought services to some of the more remote areas of the state, and have cut down request processing time. Toll free telephone lines, on a five day per week basis during normal library business hours, are most common. Some libraries have a combination service whereby callers speak directly to a library staff member during business hours, but in the evenings and on weekends messages are taken via recording. A special telephone number tied to a recording system is used in some states to take requests for machine repair needs. One library utilizes three types of WATS lines or similar no-cost-to-caller systems. A toll free message system takes requests 24 hours a day on one line: if a reader wants personal attention, he or she indicates this on the taped message. A second number is provided for pre-recorded current information. This has been used to discuss the recent change in location of the library, voter registration, and consumer issues. The third number offers pre-recorded "Book Talks," or more extensive book descriptions than those available in Talking Book Topics. These have been particularly geared toward children (or their parents) whose interests have not been stimulated from short, written or taped descriptions. The "Book Talk" program was introduced as part of Black History Week.

Local Recording and Tape Duplication - Shortages of book titles supplied by NLS/BPH result in delays in serving requests, and hence reduce circulation.* Shortages of equipment result in similar delays and reduce readership. Both types of shortages were of concern.

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*Typically, NLS/BPH establishes quotas for the number of copies of each title that will be sent to each regional or subregional library, once its selections are made for the year. The local libraries may request fewer or greater numbers of copies of these selections as they become available.

Some regional libraries have responded to the problem of material shortages by preparing and circulating their own materials. In addition to increasing the timely availability of the most popular selections, the development of independent tape duplication and recording facilities has allowed some librarians to supplement the limited copies of Talking Books distributed by NLS/BPH Central with materials of local interest recorded in regional dialects.

Information and Referral - The development of reference and referral material of special interest to the physically disabled and blind has also served the needs of professionals and stimulated the work of rehabilitation. Files of products specially designed for disabled persons and supplies of films about handicaps are now being maintained, and a few librarians are offering to share sessions or classes using these materials as ways to stimulate uses of the library beyond book distribution.

Large Print/Technological Reading Aids - Some 60% of the librarians studied have become involved in distributing large print books to low vision readers, while others claim that providing exclusively non-print material should differentiate their services from public libraries. Although most librarians specifically question the provision of low vision optical reading aids by persons untrained to prescribe them, many perceive these devices as useful for promotional talks, since they stimulate interest and graphically illustrate the potential impact of special reading services.

Two responses illustrate the diversity of involvement with the newest reading aids:

> *No! We are a library! There are others that are better used for that sort of thing. I doubt that we'd ever get into reading aids. That's for the schools. I see no reason for a library to do that. We've not had much success with them--even (brand name) light. I finally got them taken down and loaned out after the initial curiosity wore off, and they weren't used. I'd rather see people who are wanting adaptive aids get them from an eye clinic...maybe they need prescription lenses and not a magnifier. We, as librarians, presume a lot when we say to a patron, "try this." I feel strongly about this.*
>
> *Yes, but not as a library. That's more for a low vision testing clinic where such devices are evaluated as is overall functioning.*

Short Term Plans

The 1978 American Library Association draft standards for the National Library Service call on each library formally to prepare long range plans that reflect current trends. Such planning appears largely absent today on the basis of the study interviews.

On the other hand, regional librarians identified a number of planning programs for possible implementation in the immediate future. There is considerable variation on the level of current specificity: some librarians provided extensive detail in their plans, others referred to plans in off-hand ways.

As Table 2-7 indicates, most plans closely relate to the goals previously identified. Within the area of administrative goals, most plans related to the expansion of facilities, in order to accommodate increasing collections or to broaden the types of services. Within personal service goals, a wider spectrum of plans was presented, reflecting diversity of reader concerns.

Table 2-7

Short Term Plans of NLS/BPH Librarians Within Goal Areas

Plans	Percent*
A. GROWTH AND FACILITIES	38
1. Find/fund expanded facilities for existing program (5)**	
2. Develop reading room on site (1)	
3. Acquire a better/larger recording studio (1)	
B. RECORDING AND TRANSCRIBING	31
1. Develop more materials of local interest (2)	
2. Improve volunteer recording (1)	
3. Convert old Talking Books from records to tapes (1)	
4. Develop potential for brailling and taping locally (1)	
5. Increase training for transcription (1)	
C. OUTREACH CAPABILITIES	25
1. Develop staff or volunteer capabilities to provide personal visits (3)	
2. Acquire mobile van(s) (1)	
D. SPECIAL SUBSRIBER POPULATIONS	19
1. Increase services to physically handicapped and to ophthalmologists (1)	
2. Increase services for temporarily disabled, e.g. hospitalized (1)	
3. Develop services for learning disabled who cannot be served by NLS/BPH (1)	
4. Respond to increased Spanish speaking subscribers by increasing Spanish speaking staff (1)	
E. BUDGET AND STAFF SIZE EXPANSION	13
1. Crucial to settle before making any other plans (1)	
2. Generally needed (1)	

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*Percentages refer to the number of librarians from the sample of 16 responding. Three of the 16 librarians reported no plans, several made multiple responses.

**Numbers in parentheses () indicate how many librarians mentioned the item.

Remaining Questions on the Programmatic Focus of Regional Libraries

1. How are priorities set in individual states between effectively serving present readers and reaching new readers?

2. With the present diversity among regional library organization, funding, and programming, how can innovations and problem-solving techniques be shared most effectively?

3. Should preparation and provision of large print materials by NLS be made a priority in view of the extent of the population of physically disabled people with low vision, as well as the number of elderly and other people whose only problems are vision related? Does provision of large print influence later use of recorded materials?

4. What should the role of regional libraries be with respect to providing training and lending of low vision aids to the reader? With the advent of technological devices that convert print to speech, what might be the implications for the traditional separation between public (print) and regional libraries?

5. What are the implications of the NLS/BPH policy of not providing Talking Books for use by radio reading services?

6. What impact does mainstreaming handicapped children in public schools have on regional library services?

7. a. What special recruitment programs might be developed within the public schools to serve eligible school children?

   b. What will the impact be on materials and machine design?

8. Has toll-free telephone access influenced use of libraries and expanded readership?

9. Does provision of information, referral, and reference services encourage different types of users or expanded library use? How should these services be coordinated with others supplied by local public libraries?

CHAPTER 3

LIBRARY ADMINISTRATION

Responsibility for planning and budgeting are key discretionary powers for developing expanded utilization of library staff and facilities. The locus of authority and how that authority operates in devising volunteer and specialist programs, in making facilities more architecturally accessible, and in establishing other administrative practices, can also be significant factors in determining readership and circulation. This section takes up some of these issues.

Budget Preparation and Perceived Adequacy of Funding

Administration of public services includes decision-making responsibility for the allocation of funding. Yet relatively few regional librarians appear to be actively involved in developing budgets for the units that they manage or coordinate. Not unexpectedly, the librarians with the greatest budget authority appear to offer the greatest range of programs. Typically, regional library directors prepare estimates of staff salaries and costs of services needed, and submit these annually to the state or public library system of which they are a part; but the budget is often handed down without appearance and/or testimony of the regional librarian before the sponsor's funding body (state legislature, city, or city council, etc.). Some directors of regional libraries appear to have no input into budget preparation at all, and merely account for expenditures.

Nearly half (43%) of the regional librarians describe the financial outlook for the next three to five years as inadequate. This group of regional librarians is facing shortages, particularly in staffing, which forces them to concentrate their resources on meeting current demands (see Table 3-1). However, the other half of the librarians (57%) characterize their budgets as having increased recently to levels capable of supporting innovations and expansion.

The following comments relate to budget preparation and financial outlook:

> *Our budget has doubled this year...The outlook is good, but we'll have to do well with our increase. We're under pressure now, we must show increases in both quality and contracts.*

> *Our situation's good, maybe better than good...and this is the first time I was really involved and the patrons got involved.*

> *I'm a state employee, and would have to say it's adequate--but it never is. We believe that an informed public is more likely to support our program--that's why we believe in the 800# and all the other costly services that are helpful but also are visible.*

> *We are very blessed. We had one problem last year: our budget increase for the cost of living was 6% and the employees won 9%, the state would not pick up the difference. Luckily, we have a Gifts fund to apply.*

> *I would like to see payment for actual cost of our services every three or four months. Now I just account for the money that others budget and consumers spend. While I see no forthcoming increase, our State Library Director is already concerned about my expenditures for the year...yet, we see an increase in both the individual and deposit collections in just the past three months.*

Staff

The manner in which the staff are organized and operate is also considered an administrative issue bearing on readership and circulation.

Regional Library Directors

By training, directors range from community organizers to administrators and systems analysts. Some are personally adept at recording,

Table 3-1

Financial Outlook for Regional Library Services in the Next Three to Five Years

Financial Outlook	Number
"Good to Excellent"	7
"Fair to Adequate"	2
"Some Problems"	4
"Serious Shortages/Limitations"	3
TOTAL =	16

material production, and volunteer recruitment. Undoubtedly, the director's training and expertise affect program orientation and reader activity. Most directors have strong impressions of the needs of people in their state, the administrative constraints under which they work, the federal requirements of their program, and their aspirations for future services. The majority of directors (75%) are women.

The administrative levels from which regional library directors dispatch their responsibilities vary, frequently as a function of the state agency sponsoring the library.* In some cases the director is on the same level as that of the chief of a city public library, and sometimes reports to the head of a public library. Consequently, it may be expected that the salaries and qualifications vary.

Volunteers

Volunteers are heavily relied upon in many libraries where state employment regulations do not restrict their involvement. In the states surveyed, volunteers are involved in brailling, recording, and repairing machines, and are assigned clerical tasks such as maintaining lists of readers or seeking special references. In one state, volunteers record more than 500 volumes (mostly text books) annually. In several states, volunteers provide a very personal element of contact by visiting the users at home--an outreach activity not usually provided by paid regional library staff.

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*The NLS/BPH guidelines suggest that regional library directors all be at the same administrative levels as other major unit chiefs. See ALA, 1978, p.16.

The sources and backgrounds of the volunteers are diverse. Some are elderly, some are visually handicapped, some are walk-ins, others are students. One state uses prisoners to do braille transcription and duplication on a thermoform machine.

The number of volunteers used in each regional library varies from none to the equivalent of 10 full-time staff. No common system has been adopted as yet for reporting volunteer services and comparing task assignments.

Paid staff, rather than volunteers, are more regularly involved in volunteer recruiting, training, making assignments, and record keeping. Some volunteer coordinators also serve as community organizers (of county nurses, Green Thumb groups, American Association of Retired Persons, or Tribal Councils). Some focus on recording services, others develop procedures for book loan, personal contact to readers, or nursing home visits.

The use of volunteers as fundamental elements in library services creates certain difficulties. Volunteers can be slow and undependable, and sometimes appear to place more demands on library facility space, on equipment, and on staff time, than is worthwhile. Sometimes volunteers do not want to do necessary but mundane or personally unrewarding tasks. The assignment of volunteers to people who often need them most--the isolated poor, the elderly, and new patrons--is sometimes a problem.

The Readers' Advisor

The readers' advisor is a position which dates back to the development of braille collections. In some states, readers' advisors are in wide use, and select materials for heavy users of braille or recorded materials. In other states, they are being replaced by computerized systems for matching profiles of reading interests and available books. Automation involves trade-offs between greater streamlining and privacy versus depersonalization and reduced potential for catching errors. Another recent trend is the specialization of readers' advisors in the concerns of institutional readers. Sometimes these specialists work with school children (whose peak use occurs during non-school summer months), and with the elderly (whose peak use occurs in winter).

Technical Specialists and Consultants

Other specialists and consultants in technical aspects of service provision are being used in some libraries, and are planned in many more libraries. Creation and management of information systems are becoming major responsibilities of libraries: hence, data systems analysts and computer experts are needed. Specialists in tape recording, production, and duplication are becoming more common in libraries, as are staff especially trained in machine repair and distribution.

In a large number of states, institutional consultants visit communal living settings such as prisons, schools, hospitals, nursing homes, and Veterans Administration facilities. Administratively, these consultants operate on a state level from the public or regional libraries: however, they are semi-autonomous, and while some regional librarians describe close working relationships with institutional consultants, others comment that they interact infrequently.

Finally, in some geographic areas, staff are being hired to provide better services to non-English speaking readers who are eligible for the NLS/BPH program.*

Facilities and Location

The importance of the physical location and arrangement of library facilities bears on both administrative efficiency and service effectiveness. Some facility factors related to these two priority areas that were identified are:

Administrative Priorities

1. Location convenient to staff and volunteers.
2. Location convenient to sponsoring organization or funding source.
3. Adequate access for trucks.
4. Space for sorting, holding and distributing mail and machines.
5. Space for volunteers, recording and other activities.

Personal Service Priorities

1. Location convenient to patrons (e.g., population centers, public and private transportation).
2. Facilities architecturally accessible to handicapped users (e.g., wheelchair and cane users).

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*Only about 4,000 persons (including 1,200 Puerto Rican readers) are current subscribers to NLS/BPH foreign language collections. Foreign language readers are widely dispersed across the country, with readers in over half of the regional and subregionals. The languages most frequently read are Spanish (75% of readers), French (6%), German (4%), Hebrew or Yiddish (3%), Chinese or Japanese (3%), and Italian (3%). See NLS/BPH, "Summary: Distribution of Foreign Language Readership, for year 1978."

3. Areas to accommodate walk-in users (e.g., reading rooms, browsing stacks, adaptive aids storage space).

Not all of these factors are significant to every library. For example, whereas nearly all of the regional libraries studied permit readers to use their facilities on the premises (walk-in use), only 50% have a reading room, and the number of daily visits range from zero to 50, with a median of three visits per day.

The common theme in the librarians' comments was that a better fit between the priority activities of the library and its facilities will improve organization, and result in more varied and effective services. Moreover, for over one-third of the libraries, the present service priorities were reported as strongly influenced by facilities they did not have. Often, desired changes in service priorities, such as a shift from mail order efficiency to community service, were only made possible after changes in facilities and access. A number of directors offered experiences:

Administrative Priorities

> [In several months, this library will be moved to a new building, to be shared with the state library. The location will place it much closer to the capital, which the director anticipates will increase their ability to influence people "in state appropriations." Currently, their services are split up, with administration in one facility, and materials distribution and machine maintenance each being handled in others.]

> [This regional library shares facilities with the state library...Its location is close to the central Post Office, next door to the education department--which is important in its focus on educational materials and youths.]

> *Our major concerns will be growth: we are going to have to go off site for storage.*

[Although it now shares a public library building, this regional library director would like to see the regional library be a warehouse.] *It could be anywhere. Whereas in a given day 1½ hours might be spent in patron contact on site, we move 15,000-16,000 containers of mail.* [Their present stacks are inadequate and preclude use by patrons.]

[This regional library is located in a warehouse--in a neighborhood of warehouses. The regional library director cites this as a problem in the desire to work directly with patrons...although it has its advantages in terms of access to the freeways and bus lines for distant travellers and mail carriers.]

Personal Service Priorities

The building is currently being made accessible: it is not yet. But when it is, there may be more patrons and more disabled persons, which we would like to see...We don't really have a reading room. We could work something out. [This library director continues with an explanation that people do borrow materials directly for use at home--to circumvent slowness in postal deliveries.]

Remaining Questions on Library Administration

1. Should regional librarians be actively involved in preparation of budgets that they administer; if so, what guidelines are appropriate?

2. Can experiences be shared on the recruitment, management, costs, and impact of volunteers?

3. What can be done to assist states where volunteers are precluded in library services due to labor union restrictions?

4. Should institutional library consultants from the state library system be better integrated into regional library services, and if so, how?

5. How can the methods and costs of adapting existing facilities to facilitate architectural accessibility be best presented?

CHAPTER 4

ISSUES RELATED TO REACHING NEW SUBSCRIBERS

Regional librarians typically categorize subscribers into groups of readers who have different programmatic needs. These user groups are:

Disability Types	1.- Visually impaired--those who have problems seeing.
	2.- Physically handicapped--those who have problems holding a book or turning pages, or become easily fatigued.
	3.- Learning disabled--those who have problems in perception, memory, understanding.
Age Groups	4.- School-age children--those who have education needs.
	5.- Elderly---those for whom social isolation, mobility, and general health may be additional concerns.
Special Needs	6.- Non-English readers--those for whom most available reading materials are not satisfactory.
	7.- Persons living in health care facilities--those who have special health problems that require regular supervision and management beyond the individual's personal capacity.

As seen above, users usually fall into several groups depending upon living situation and age. Additionally, many readers have multiple reading disabilities.

In addition to the overall problem of inadequate funding and staffing, a number of unique programmatic issues were identified by regional librarians that were related to reaching new readers in each user group, and expanding their utilization of the NLS/BPH program. These concerns fell into three broad areas:

1. Historical image of the NLS/BPH service.
2. Eligibility and certification procedures for each of the user groups.
3. Developing outreach activities to promote the library program to user groups.

Throwing Off the Historical Image As a Service Only for the Blind, And Reaching the Physically Handicapped and Learning Disabled

The national library program was first developed some forty years ago to serve legally blind people. With that tradition, the general public often continues to associate NLS/BPH services with the blind. This image hinders the expansion of readership to qualified physically handicapped, learning disabled, low vision, and elderly persons. Many of the elderly who have vision problems are frightened by the term "blind," and consequently do not seek services offered to blind people.

The extension of services to the physically handicapped presents a special challenge, even thirteen years after services were extended to this group. The situation can be particularly complicated for librarians housed within or receiving funds from a state agency for the blind. Responding to this challenge, some libraries are now emphasizing services to the physically handicapped in their promotion and outreach efforts. One librarian noted:

> *We've worked hard on an image change...Our people now answer the phones and send out correspondence on stationary that reflects our handicapped service. In our news releases, we take each opportunity to say "handicapped" and to spell out what that means and what we do. We are actually de-emphasizing our blindness affiliation--and*

> *we've had no "blind backlash." In a recent conference I attended of the blind, no one criticized that.*

One possible reason for the difficulty in expanding readership among the physically handicapped and learning disabled is that no single organization acts as a conduit for information or provides services or advocacy on a state-wide basis. Regional librarians interviewed commented that reading seems to have a lower priority, compared to the elimination of architectural and employment barriers, for many of these disability groups. Librarians emphasized these points:

> *...compared with two organizations of the blind, we have twenty for the handicapped.*
>
> *We've not had much luck in getting to the handicapped... or getting their input; their causes seem to be accessibility. The active spokesmen are able themselves, in terms of print matter usage, and they don't seem to recognize that some among them may not be able to use print.*
>
> *They have not been as much served, their organizations have not been strong.* [This librarian cited examples of the blind organizations doing the advertising and making personal contacts for NLS services, as well as providing the major consumer input to the regional library. No such similar interest had been stimulated from among the ranks and affiliates of any disability group.]

Applying Eligibility and Certification Procedures

The precise conditions for eligibility for loan of materials prepared with federal monies are set forth by NLS/BPH (Washington, D.C.). These are given in an Appendix. Basically, they include:

1. Legally blind persons.
2. Other persons who are unable to read or use standard printed matter in a normal way on account of:
    a. Visual disability, with correction and regardless

of optical measurement.

b. Physical limitations.

c. "Organic dysfunction" of sufficient severity.

In addition to individual users, institutions such as schools, nursing homes, and hospitals may act as deposit collections or mini-libraries for residents of their facilities who meet the conditions in (1) and (2) above. Residents of institutions may also subscribe to and receive materials and equipment as individuals.

All users of NLS/BPH materials are required to be certified by a "competent" authority to meet the eligibility requirements. In cases of visual disability or physical limitations, a competent authority may be a doctor of medicine, ophthalmologist, optometrist, registered nurse, therapist, professional staff of an institution, or social service agent. Certification may also be made by professional librarians. In the case of reading disability due to organic dysfunction, a "competent authority" is defined as a doctor of medicine who may consult with colleagues in associated disciplines.

Responsibility for implementing these prodedures and reviewing applications of new readers lies with the regional libraries. In most cases the handicapped person is known to some competent body that makes him/her aware of the NLS/BPH program. A doctor, rehabilitation center, staff member, or state commission representative who knows the individual's medical history, or can observe his/her functional abilities, completes and certifies the written application form. In other instances local public librarians certify eligibility. Responsibility for reviewing applications of new readers has sometimes shifted from regional to subregional libraries.

Regional Variations in Certification of Individual and Deposit Collection Users

Certification is made with some, although varying rigor between states, as might be expected where definitions of eligibility permit flexibility and interpretation, and where there is no single adjudication body. For institutional deposit collections in health organizations, there is much less rigor in applying the eligibility requirements than for individuals, since certification of readers in nursing homes is typically accepted from activities or nursing staff rather than from a medical doctor. Some comments of librarians follow:

Overall Observations

> *We try to be tight* (about certification). *With individuals we're pretty good...We get cooperation from the Lighthouse* (for the blind).
>
> *We are casual about certification.*
>
> *...but, in general, we would not be a strict state in terms of certification.*
>
> *Also, local librarians can certify if it's a small library and they know the people well.*
>
> *Most referrals and certification, according to a study we did, are made by librarians at the local libraries. They know who comes in regularly; as these people get old and suddenly stop, it is they who check and find out that the person cannot see any longer. Following the librarians, MDs, OTs, PTs, teachers, and ministers make primary referrals, according to our study.*

Observations Specific to Registration of Institutional Deposit Collection Users

> *We tell an institution that if a person cannot read a book*

comfortably, then he or she is eligible....We're also casual about one's eligibility to keep machines, as a nursing home.

The institution's director usually signs our certification...

We allow the Activity Directors to sign, with the understanding that they are responsible to make the determination.

In terms of nursing homes or any institution, we accept the fact that if they are in an institution, they are eligible. This has occurred because we found out that old people were having to pay for a doctor's visit in order to get certified.

In nursing home certification, we have no real problem. Most of our nursing homes we've worked with for years, we get them accustomed to our requirements. Most of them are very careful because this is a federal program.

The Activities Coordinators are OK, they can certify, we don't wait for an MD, we've trained these Activities people enough.

We accept the nursing home staff member's certification.

Variation in Certification of Readers With Different Disabilities

Librarians report that certification of severely visually and physically disabled people poses no apparent difficulties, and certification of people with lesser visual and physical impairments poses only minor problems. In most of these instances, the cause of reading disability can be observed without a clinical examination.

However, certification of readers disabled from organic dysfunction (i.e., learning impairments such as dyslexia or mental retardation) poses major problems. Typically, the disorders of this group cannot be judged by observation, and NLS/BPH does not consider librarians as "competent authorities" to certify. Nor are psychologists, who do much of the evaluation of the functional capabilities of the learning disabled, especially in schools. As a result, certification procedures appear more restrictive for readers who have learning disabilities. The regional librarians have met this problem with varying degrees of uncertainty and aplomb.

> *We've been strict in certifying our learning disabled as eligible...*
>
> *Our biggest problem with certification is with the school psychologists who are working with the learning disabled. LC indicates that certification must be made by a medical doctor (licensed) and these psychologists are not medical doctors. They argue that medical doctors do not understand learning disabilities. Each fall there is a problem of fighting with a school psychologist over certification.*
>
> *Learning disabilities are our major problem group in certification. The problem is just what learning disabilities are; school professionals are not specific in their statement of learning disabilities. We may follow up an application with a call to find out what the learning disability is, the school will say "mental retardation," then we tell them that we can't serve the mentally retarded. Well, then we find out that the child is physically handicapped; under those conditions, we can serve him...our problem is not as much with the availability or willingness of MDs to certify, but more that the school officials are not clear about their identification of the learning disability.*
>
> *We try to certify the learning disabled as vision or physically handicapped first. Really, there aren't so many in the grey area.*
>
> *Learning disabilities are an awkward problem for us. LC is pulling together a committee to study this. We should be able to pick and choose who is a competent authority. We need to extend services to those who qualify. LC should recognize that if the educational setting has done the testing, then any of those involved: the teachers, the teacher's doctor, some other specialist--all of these can make a determination. Our schools are pretty good. They understand that there's federal funding involved, but they disagree that the MD is the appropriate one to make the review or sign the certification. That causes us problems.*
>
> *This* [is] *one area LC seems to want strict eligibility information on. That may be fine when we consider the 3%*

> *or so that are children, but what about the main bulk of learning disabled who are adults and who have no or little likelihood of being tested?*

Developing Outreach Activities to Promote the Library Program to User Groups - Case of Responding to the Special Needs of Readers in Health Care Facilities and Schools

Responding to the reading needs of persons residing in health care institutions is becoming a higher priority in many states as a result of a growing awareness of the preponderance of older persons among subscribers to the regional libraries, and because of recent efforts to improve the general care of the elderly. Some librarians' comments on current directions follow:

> *At the library, we have seen the institutionalized or nursing home residents as an important part of our readership for a long time--but now our state puts a strong emphasis on these people. Our Governor has placed a strong emphasis on cleaning up nursing homes. Our philosophy is consistent with his. The increase in our budget--doubling it this past year--was in large part due to the consistency of our thinking on nursing home services.*
>
> *We're going to have better services to all of our institutions in this state because the people in the field--patrons and their families raised hell...they've contacted officials at all levels...they're not bashful people here. They contacted the governor. Now we're going to be able to go out to nursing homes...our budget situation looks good.*

Concerns About Reading in Health Care Facilities

Serving residents of nursing homes and other health care facilities has presented many difficulties and controversies for the regional librarians. When a deposit collection is established, a representative from the sponsoring organization takes responsibility for direct contact with the users of NLS/BPH materials. Consequently, the regional librarians are not directly involved with residents of nursing homes or students in schools who are deposit collection users. Often, the individual in an institution can lose identity: the institution itself becomes the reader with a personality defined by the category of materials, issues, and the speed with which the institutional staff return them. As a result, many librarians are uneasy over the lack of personal contact with the residents themselves, and the lack of control they have over services in these facilities. For example, some librarians see nursing homes as simply wanting the use of a free record and cassette player.

> *I've been in nursing homes and* [have] *seen the books stacked in closets, while the record player is used for background music in the activities room...Most institutions want a free machine. Our first goal is to provide the material--we then provide the machines appropriate for playing it--we are not in the business of providing free record players for these places.*

Another major problem identified is inadequate staff and high turnover in nursing homes. Often staff cannot be depended upon to carry out a program from year to year.

> *We found that it's difficult for patients in nursing homes to use the machines. Nursing homes do not have enough help to change the records--cassettes are confusing. A lot of times the director will use the Talking Book machine as a "get-together" and they will listen together. One-to-one (machine to person) does not work.*

> *Our biggest problem has been staff turnover with occupational therapists. The program can be a success when someone on the staff is motivated...this may change: activities directors are now getting degrees. This should improve things. As their salaries improve, turnover should lessen.*

Librarians say that they must continually "sell" their services to activities or social service staffs rather than wait to be contacted by the nursing homes.

> *There are not enough personnel in nursing homes. Our work must be done by telephone and mail; we do not know who is out there. We must wait for the patron to call us. There aren't enough people in the institutions to even help each other out. If there were volunteers, it might be different...It would take several years even then to get a real program going. The nursing home has its own priorities and pace. Things don't go over that don't have a good likelihood of success--and our program and machines can be rough on patients--can cause problems or frustrations.*

A number of regional librarians objected to the staff procedure of screening items before nursing home residents can read them. An example of staff censorship observed by librarians is institutional use of the Talking Book machine as a reward for satisfactory behavior patterns. Two directors comment:

> *We find nursing homes are anxious to have our services on their terms, which means controlling assignment of machine and selection of materials. We and LC advertise "free public library services for the handicapped." We should be available to anybody, regardless of what material they might want to read. The institution's staff sometimes object to some items. We've had homes refuse to circulate Playboy or MS... Censorship by the Activities Director--that's a problem*

> *We have a minor problem with activity directors wanting everything sent under their name rather than signing up each individual with a file.* [This makes it easier for the home to manage materials. The advantage of signing people up under their own name, this director feels, is better services, better statistics, less possibility of "screening" material. Very few institutions are really set up now as total deposit collections, and residents cannot easily use materials independently, due to their physical disabilities.]

To deal with these problems, some librarians have developed highly structured orientation programs for nursing home administrators and staff. Sometimes these include training nurses aides and volunteers how to operate the equipment. Alternatively, subregionals at the local level are regarded as one means of providing greater institutional contact. A few regional librarians visit nursing homes themselves to learn about both residents and staff, to reduce wariness in these homes about accepting yet another federal/state program, and train eligible residents how to operate the recording machines, and a few regional librarians are trying to exert more control and provide improved services by encouraging individual subscription in nursing homes.

Some librarians feel unable or inadequate to make these efforts. Perceived costs of personalized services are a key barrier to services in nursing homes and health institutions. Budgets have often not been planned to cover the cost of extensive outreach services necessary to cultivate institutional populations. Commitment by line staff to these readers is also questioned, as the following comment reflects:

> *Some of our local public librarians cannot grasp the idea of these people in institutions being tax payers...*

Concerns in Reaching Subscribers in Schools

Similar problems as those identified for nursing homes and hospitals were described in regional library services to schools. Four points were again demonstrated:

1. The importance of gaining the cooperation of administrators.
2. The need to develop (within these institutions) self-sufficiency in use of the machines and

selection of materials.

3. The need to cultivate and work with at least one responsible person in the institution who will take a substantial interest in Talking Books and braille.
4. The need for personal on-site visits to regularly stimulate and assist in material selection and to coordinate machine repairs.

Historically, many children with reading handicaps were easily identified and serviced because they attended special schools for the blind or handicapped. But in recent years, with mainstreaming of handicapped children into local public schools, it has been more difficult to reach and assist these students. Planning to meet this challenge has not been particularly widespread. Some librarians remark:

> *Recently we have initiated a program in the schools where librarians and teachers work with the children on the use of machines and require certain competence before kids can sign machines out for home or weekend use.*
>
> *Institutions (health care) are not a problem with maintenance; the problem is schools: children are very destructive.*
>
> *Teachers have contacted me asking for free machines. We have a great problem having institutions provide books first--then machines.* [This librarian objected to the distribution of machines without using them primarily for regional library materials.]

Remaining Questions Related to Reaching New Subscribers

1. Since many programmatic issues relate to the needs of eligible users, should certification forms and procedures be revised to include questions on the functional disabilities of users?

    a. How should diagnoses of disabilities be updated for readers over time?

    b. How may this information best be communicated to the NLS/BPH office in Washington, D.C.?

2. Should new guidelines be developed for defining and certifying the eligibility of people having reading difficulties as a result of organic dysfunction?

    a. Can this group of readers be more clearly defined?

    b. How may persons who have mental or emotional problems affecting reading be certified when many of these have a physiological basis?

    c. What are the implications of designating professionals other than doctors of medicine as competent authorities to certify adults with learning disabilities resulting from organic dysfunctions?

    d. What are the programmatic implications of extending NLS/BPH services to these groups in terms of outreach, materials, and machine design?

3. What experiences can be shared in changing the traditional image of regional libraries as a service for the blind only to a service for persons with all eligible disabilities in using regular print?

4. With the overwhelming majority of elderly readers, and in anticipation of increasing numbers in this age group, should NLS/BPH materials, machines, and programs be more consciously oriented toward this group?

   a. Would library staff at the national, state, and local levels benefit from information on the functional abilities and programmatic implications for elderly readers?

   b. Should libraries be given more insight on how to perform public relations with elderly persons, many of whom become blind or disabled late in life and do not identify with NLS/BPH or related services?

5. In addition to the international interlibrary loan and exchange, and the foreign language collection plan, are there any other ways to improve services to foreign language readers? How might foreign language materials be optimally shared between libraries in a cost-effective manner?

6. How can the role of social service agencies be kept in perspective so that they have input while not superseding the direct impact of consumers? Similarly, how can these agencies be encouraged to work more closely with regional libraries by identifying and referring eligible readers and by referring them to the program?

7. The provision of library services through shared equipment and book collections in health care, rehabilitation and educational facilities raises a number of special problems:

   a. Can experience in working effectively with deposit collections be shared?

b. To permit self-reliant, eligible persons, residing in institutions to make maximal use of NLS/BPH services, should a priority be placed on signing up these readers as individual subscribers? Are there adequate numbers of machines to permit such a procedure?

c. Would it be useful to mark institutional deposit collection machines and materials (such as using brightly colored coded labels) for purposes of control and statistical record keeping?

d. Would it be useful to make available adaptive equipment in adequate quantities to facilitate use by the hard of hearing and by the bedridden readers?

e. Should volunteer workers be recruited by the regional libraries to aid in serving readers who reside in institutions? These volunteers might promote wider use of NLS/BPH services and compensate for institutional staff turnover, staff shortages, and apparent disinterest.

CHAPTER 5

ISSUES RELATED TO IMPROVING EXISTING SERVICES FOR SUBSCRIBERS

Regional librarians identified five issues related to improving existing services to subscribers as a means for expanding utilization of the program. These were:

1. Selection of reading materials appropriate to subscriber preferences and capabilities.

2. Equipment design, incorporating necessary human factor considerations.

3. Mechanisms by which readers learn about available book and magazine titles.

4. Acquisition and disposal procedures by which readers borrow and return materials.

5. Mechanism to ensure that the materials and equipment are being properly and fully utilized by subscribers.

6. Establishing mechanisms of regular input from subscribers and organizations of and for the user groups.

For each of these issues, consideration needs to be given to the special needs of each of the subscriber groups discussed in the last section. For example, for the elderly (persons over 65 years old), who constitute upwards of half of the regional library subscribers, outreach and machine design are the primary problems identified by the librarians. The adequacy of mail order operations to serve the needs of the physically handicapped and learning disabled is another major concern. Many regional libraries have not as yet modified their physical facilities to accommodate handicapped readers on the premises.

Selection of Reading Materials Appropriate to Subscriber Preferences and Capabilities

The selection of titles and topics for Talking Books and braille is entirely within the purview of NLS/BPH in Washington, D.C. The librarians interviewed were generally satisfied with the number of titles available, allowing for financial constraints. However, each expressed opinions on where and how the collections need to be strengthened. These are summarized in Table 5-1. In general, librarians see the need for more adult materials at an 8th grade (or lower) vocabulary level, materials of shorter length than the standard book (to be consistent with the attention spans of many older subscribers), and materials utilizing more than one voice. In addition, they requested more romances, westerns, mysteries, religious inspirational materials, and more materials in foreign languages.

These perceived needs reflect changes in the characteristics of subscribers seen at the local level. Although NLS/BPH has several programs to obtain recommendations for titles directly from readers and regional librarians, the librarians interviewed felt that increased consumer input to NLS/BPH's selection policies is vital to the overall process of preparing appropriate materials. The following specific comments are summarized as a list of categories in Table 5-1.

Need for High Interest, Low Vocabulary Materials

> *We need interesting materials at lower vocabulary levels. For example, many of our nursing home patrons only have an eighth grade education; modern mysteries, for example, won't do.*

Table 5-1

Regional Library Views on Desirable Emphasis of New Titles

Reading Interests Identified by Regional Librarians	Percent
1. TYPE (16)*	
Nonviolent/nonsex	13
"Not so conservative"	6
Adult: high interest/low vocabulary level	31
Adolescent: high interest/low vocabulary level	6
Children's material	6
Preschool material	6
Dramatic material	25
"Non-dramatic"	6
2. TOPICS (10)*	
Religious/inspirational/religious stories	19
Gothic romance	13
Non-gothic romance	6
Western	13
Biography	6
How-to and home gardening	6
3. LANGUAGE (14)*	
General materials on languages	6
How-to-speak-English	6
Various American Indian dialects	13
Spanish (1 Cuban)	25
French (1 Canadian, 1 colloquial)	13
German	6

---

*Number of librarians responding; multiple responses possible.

Most frequent requests are from teachers--for high interest, low level vocabulary materials.

Need for Shorter Length Materials

If LC is going to encourage us in the direction of greater service to institutional patrons, then we need to have appropriate materials, [including] *short stories, Matilda Ziegler's and collections which include large type, such as The New York Times or Reader's Digest.*

We need more good short stories and shorter length books. I realize that when LC makes selections, the length does not and probably should not figure in... yet, our patrons make requests by length, and favor the shorter items.

During the activity hour, people in nursing homes fall asleep listening to one of our books--they can't follow one book for an hour.

Selecting the Voices for Recordings

We need material recorded by American readers, the British and Scottish readers frequently generate complaints.

Many readers speak too fast, tapes now are being made to sound more professional and not as personal.

We have patrons who request male readers or deep voiced females--probably due to their hearing problems. Maybe a tone control could be helpful in mechanically deepening voices.

Dramatization: Pros and Cons*

I dislike the apparent movement toward dramatization of materials. Story telling is an art; children should not be confused by the introduction of so many readers.

---

*NLS has a continual problem in increasing such materials in recorded form due to stringent copywrite laws.

We'd like more dramatizations--and shorter items for nursing homes--their attention span is not as good. Maybe more short stories would help. We've tried the plays--some don't like the children's material.

Need for More Materials on Specific Topics

We never get enough religious and inspirational materials or enough westerns and mysteries--just as in print matter.

There never seems to be enough materials for the heavy readers of the type mentioned--although there is enough material, it is not what they are requesting.

We doubt they ever write enough mysteries and westerns ...LC probably does keep up with what's available. The problem is that a western or mystery reader won't request anything else--maybe somebody should fund more writing of these materials.

The majority of our readers are sophisticated and looking for timely information on current problems: examples such as the Middle East, the Canal, congressional decisions, political information...Documents, not just books, should be included--on flexible discs if necessary.

We get many special requests for French, especially among our senior citizens in nursing homes. Frequently, however, the French they require is not learned, but colloquial--and therefore not available.

Spanish materials--a big need--we are pretty much limited to what the Division produces; in this area, we could also use Chinese, Japanese, Korean, Tai, Vietnamese--we have nothing to offer in these areas.

For Indian readers, we would like to see poets, writers and non-fiction of the Indians improved, not just translation of classics to their native tongues. We've pretty well responded to the needs of the blacks, now let's move on to development of materials for other minorities.

We've got people who say, "I want to learn English, I guess I'll read a juvenile book," but anyone knows that the vocabulary structure in juvenile books can be quite advanced.

Reading Material that Attracts the Elderly

> *We hit on something that worked and really increased our elderly readership. Through our efforts to record local materials, a "home" weekly is recorded. It's out of* [a nearby city]. *Although the print version contains national news, we don't record that, but we do a "Heart and Home" section. It includes personal letters and hints. We now have requests from 15 states for copies. It's a great source of patrons for us because in their advertising of the print version, the publisher has a regular sign-up that comes to us. Since October, 1976, we've gotten over 100 new elderly readers from that.*
>
> *Many are emotionally unable to accept controversial or sexy materials.*
>
> *There seems to be a conflict with LC's effort toward recognizing its older readers and increased recording in "popular" language--that's not well received by the elderly. Right now, there's probably an OK balance between the "acceptable" and the "slang." They should be warned not to overdo this.*
>
> *If we were to concentrate attention on increasing services to older readers or to people in institutions, we should reassess with LC our overall collection of books and magazines. We would probably want more regional materials---about the south or recorded by people with our dialects...and more shorter length items.*

Braille

While regional librarians have a high respect for braille users, they are seeking guidance on the maintenance of bulky collections, and question the priority of braille, given the increasing costs of production and mailing for what seems to be a declining usership.

> *Our biggest problem, like most regional libraries, is* [braille] *storage and increased collections with decreased usership...The storage problem I've been able to solve in a new building with high density storage units. Approximately 20% of the shelving serves less than 5% of the users. As* [braille] *circulation lowers, it's a wonder the budget-conscious don't ask us why we don't close or consolidate our braille collections. We don't want to do that, but the time may be coming when questions are asked.*

> *What are we going to do about the braille program? We just cleaned our braille file and lost about 200 more patrons. Again, its a larger collection for fewer people. Braille's not being taught. Why don't we get some suggestions on what to do?*
>
> *The young like braille--they need it to learn.*

Equipment Design Incorporating Necessary Human Factor Considerations

All of the NLS/BPH regional librarians are extremely involved in the distribution of recorded materials and equipment, and their thoughts on further design improvements for players focus on special human requirements. They see a need for greater portability and reliability. Special features like variable speed control are important, but improvements in tone quality for extended listening, and the ability to operate the playback equipment with a minimum of physical exertion and complexity are considered vital.

> *This program is supposed to be for the physically handicapped. We count all or a substantial portion in service estimates--but our Talking Book machines can't be used by all of them. Many are so disabled they can't operate the machines--how do we count them, or why can't we have the necessary items to serve them?*

Observations on the Conversion from Record Players to Tape Players

Currently, most regional libraries have collections of Talking Books on records, built up over the years, that are many times the size of the collections of new Talking Books that are being supplied on four track cassettes by NLS/BPH. Lower production costs (and lower postal costs borne by the U.S. Postal Service) and ease in storage were important reasons for this change.

Unlike the collections of Talking Books which are loaned to borrowers and then recirculated by the regional libraries, most current periodicals are sent to a subscriber for his/her exclusive use. Since the magazine will not be circulated, the recorded magazine does not need to be prepared in a form capable of withstanding repeated use. Hence, flexible, thin vinyl discs are used. What this means is that the avid reader of books and magazines requires both a record and a cassette player.

Two major issues are present in the current situation. One, despite recent NLS/BPH surveys on consumer satisfaction with four track players and a positive Canadian experience with cassettes, the conversion from records to cassettes greatly concerns many regional librarians. The main problem seems to be overcoming the resistance of the elderly and physically handicapped to adopt cassette players, which for many are more confusing and mechanically more difficult to operate than the record players. Two, the current record players themselves are judged to be large and awkward machines, and while relatively reliable, have poor tone quality--especially for extended listening and enjoyment. Hence, a lighter, more compact device is desirable.

> *The school for the blind in this state recently did a survey and found that tapes were preferred by most students, but that they had many problems with the 4-track and its operation.*
>
> *Records are still our "big mover." We circulate five Talking Books on records for each cassette. But this is changing as tapes are getting better.*
>
> *Cassettes are easiest for librarians. We're happy to see that since cassettes we've had an increase in circulation. We cannot practically maintain a large collection on discs. Cassettes will be more familiar as time passes.*

> *During the first 3-4 years of the cassette recorders, we generated a lot of negative PR, but in the last six months, we've seen the requests for records drop and the requests for cassettes rise.*
>
> *Nursing homes like the tape machines at first, because of space requirements, but they generally move quickly to the record player to be able to take advantage of the magazines. Then they usually return their tape players.*
>
> *I'm convinced that record players are easier than cassette players, especially since 4-track cause problems; breakage and rewinding are a problem. For the majority of the readers, the 8 RPM record player is the best. But, I want to see both of those machines continued.*
>
> *I don't think record players can be phased out for twenty years--until after old people die or drop out.*
>
> *We just don't believe the cassette players will supersede the record players, especially as long as there are flexible discs which can be kept.*

Observations on the Cassette Players and Cassettes

Improvements were noted by regional librarians in the newer cassettes and cassette players. Additional developments were found desirable, especially in the design of four-track tapes. The need for training in the operation of these units was also underscored.

Design

> *Cassette players yield many complaints about breakdown, greater likelihood of service termination, and users are more likely to be heavy readers...the C-76 is a major problem.*
>
> *I wish they'd do whatever is necessary to make the machine less confusing.*
>
> *I would like to see that the tape was stronger and less likely to get scrambled in the machine.*
>
> *Why don't they use higher quality tape and cassettes? We try them out ourselves and they don't work. These breakages are especially frequent with the physically handicapped--so it may be a problem that user training will alleviate.*

Instruction

> *We've had a lot of problems with the machine jamming the tapes. However, since we've instructed the readers to always hit "rewind" first, then "stop" and "forward," to straighten out any excess tape, we've had many fewer problems.*
>
> *The problem with most cassette machines is our inability to use them, not the machine itself.*
>
> *Many senior citizens have had sight in their mind's eye--they can operate a record player. Punching buttons on a tape player is a new thing...They feel like they're handling something they don't even know what it looks like...*
>
> *Four-track is confusing to the elderly. They listen to the instructions and get confused. We've gotten back books with notes, "side five is missing"--because they don't know how to turn it two times. I like tape and I don't think the situation of instructions will improve until we can work one-to-one with the readers --and there's no staff for that.*

Observations on a Combination Record and Cassette Player

Regional librarians are also interested in the potential of a "new combination player" which is to incorporate both cassette and record playing features. Some design suggestions follow:

> *A small machine...would be the best design. Our hope is that it will help the institutional users--their biggest problem is space. Machines are now often used on beds and stored on floors.*
>
> *I've heard about the combination machines--we want them. A lot of people order materials by titles and don't realize the media problem--they don't grasp the idea that not everything is taped and on cassettes. We've tried to alleviate this by recording on our own--but we can't make records from cassettes.*
>
> *I disagree with the combination cassette/disc machine because if the turntable breaks they must go without. At least now they have one machine if the other breaks. And because it...won't be portable, it's going to be even larger.*

Observations on Attachments and Adaptive Equipment

Accessory devices like headsets, pillow phones, and remote control devices supplied by NLS/BPH were generally felt to be too often unavailable and of inferior quality. Newly designed headphones that permit comfortable, private listening are now in production, and should alleviate some of these concerns.

However, some regional librarians noted that they simply stopped circulating remote control units because of design problems. Conversely, the design of pillow phones is acceptable, according to the feedback that librarians are receiving; but there is a shortage of these devices in spite of the restrictions on usership and limited knowledge of their use. Consequently, pillow phones have frequently been limited to bedridden readers, although they have been often requested by other readers because they are more comfortably used than the present headphones. Awareness of the adaptive attachments needs to be expanded, in the librarians' views.

Overall

> *In* [this state], *the volunteer groups, funded by grants and supervised by blind agencies, do the distribution of machines to new users in their own homes or institutions. They don't always bring the adaptive equipment to the attention of the potential user. We've just discovered this, and don't really know how best to improve this situation.*
>
> *Adaptive attachments need to be more thoroughly advertised.*

Remote Control Devices

> *The remote control does not work--you can plug one in and come back in two weeks and it just isn't working. Its failure rate has caused us to tell people we just do not have them.*

Built-in speed control is tremendous, but the remote control devices have never worked--patrons don't request them anymore.

People do not use these, they go out and come right back because apparently they do not serve the purpose. They think it will be like the TV remote control device; it is not, so it is returned.

The remote control burns out quickly.

Pillow Phones

Nursing homes like pillow phones very much.

We do use them, but we have an adequate supply only if we limit them to the bedridden. We tell people who are not bedridden but who want them, "just be glad you don't qualify."

Pillow phones are misnamed. They can be used like a telephone for people who are sitting up. Perhaps they could be clipped to chairs. Many prefer these to the head or earphones which seem to hurt after prolonged periods of time.

Borrowing and Returning Books and Equipment

Regional librarians were generally pleased by procedures to lend reading materials and equipment to subscribers. Many librarians develop profiles of reading interests at the time of subscription, and send out books that they feel readers may enjoy as new titles are received. Other librarians wait until requests for specific titles are received to lend materials after each edition of the Talking Book Topics and Braille Book Review is examined by subscribers.

The recognized need by regional librarians for expanded reader advisory services for the elderly and to work in institutional settings has already been discussed but is worth re-emphasizing. As two librarians put it:

> *We need to be able to provide more Reader Advisory services, given that the highest proportion of our readers are in the 30-89 age bracket. We need to provide advisors who have notions about what these people want to read and what they don't know. Our advisory committee does not reflect this large group of geriatric shut-ins. We will have to organize more geriatric outreach services.*

> *We had the first* [library service] *for the elderly. We serve a lot (75%) --maybe because of our system of having local libraries refer to certify patrons. Our library--out state--has a tradition of outreach. We're used to having people take books to the homebound--when they can no longer read the books--at least in many of our areas where volunteers can be used, then they are referred to Talking Books.*

The return of materials by mail for recirculation is not felt to cause subscribers a great deal of difficulty, and impacts negatively on their use of the program.

Machine Lending - Most regional libraries are the machine lending agencies for their states. However, in those states where machines are loaned by another agency, the librarians were generally satisfied with the machine services that these agencies provided. Separation of responsibilities sometimes causes problems in communicating prodedures for distributing and repairing machines, and in dealing with shortages.

Need for Orienting New Users to Machines

> *The volunteers who handle machine lending really get to spend time with the people.*

> *We are the major machine lending agency for the state, and have no field staff. We send the machine directly to the individual as would a mailing house--and have no way to provide personal or direct contact in teaching use of the machine. It's a Catch-22-like game: we provide instructions on machine use on a disc or tape that you have to know how to use the machine in order to play.*

> *We try to keep machines in every small library--even though they're not subregionals--or at least in the systems' libraries so that they can handle lending and training.*
>
> *One problem with having a separate machine lending agency is that people are signed up for years and never know how to get the machine repaired.*
>
> *We see tremendous turn-over in people--they're on the move; this causes loss of machines--or at least we lose track of them--they then turn up in the pawn shops or on flea market tables. If we did the lending, it might involve us more in the control.*

Maintenance - Subregional libraries sometimes perform local repairs and coordinate the activities of Telephone Pioneers* in their area. Some regional librarians are frustrated by their increasing role in machine repair services since the introduction of tape players. Others suggest that since maintenance is not part of the general program of orientation and training for readers, repairs are more common than is necessary. Many states appreciate the willingness of NLS/BPH Central staff to offer workshops on the newer tape players. Institutions are particularly lax in reporting machine problems--sometimes librarians are only aware of the problems through annual calls made to determine why deposited materials have not been returned.

Postal Services and Service Delivery

A hidden factor in the cost and success of the program is area postal service. Some NLS/BPH libraries are the major bulk rate mailers for their post office, and are planning new facility storage with postal requirements in mind. Others shared suggestions on working effectively with their postal officers:

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*The Telephone Pioneers of America, an organization of 35,000 current and retired telephone company employees, repair and adjust Talking Book record and cassette players on a volunteer basis in states across the country. In some communities, they also deliver and demonstrate equipment to new readers. These volunteers can serve as an excellent source of input on machine design and use problems.

Streamlining Mailing: Suggestions and Procedures

> *With this location, the PO does a good job for us. We sort things for them by the first three numbers of the zip codes. The post office will call us when they get a shipment of 300 machines. Rather than deliver and re-pickup, we go down and label them for mailing right there --saves everybody time and work--and us, space.*

How One Post Office "Helps," But Faulty Machines Get Circulated

> *One of our biggest headaches is really the result of the helpfulness of the postal staff. They don't seem to know the function of the "universal" white string--the one that's to indicate machine dis-repair--so they take them off and we end up with malfunctioning machines in circulation.*

With the expectation of becoming more effective in meeting subscriber needs and funds and opportunities become available, some libraries are automating their files on: subscriber/reader interests and ordering, machine lending and repair status, and availability of selections by categories (mysteries, love stories, religious, etc.), titles, and media. Computerization does not seem appropriate, in the view of the library directors, for the smaller subregionals where the librarian is responsible for 500 to 1000 volumes a year. Here units are working as a small mail service, and take pride in personally filling requests and assisting in selection of titles.

Establishing Mechanisms of Regular Input from Subscribers and Organizations of and for Subscribers

The experiences of a few regional libraries with very active input from subscribers show that widely representative consumer panels may be an unexplored mechanism of reaching new readers and gaining program insights. Nearly half of the regional librarians interviewed have some formal mechanism for regular input: usually this is a consumer advisory board.

As illustrated in Table 5-2, a number of libraries have advisory boards that include advocates or professionals rather than subscribers. Board representation of the various user constituencies on these boards does not seem very common. Blind persons are notably more prevalent than are persons with other types of disabilities as consumer representatives. The functions of consumer panels or committees vary widely. Typically, committees react to information on new library services and procedures, although some participate in formulating policies, setting priorities, and planning budgets. Regional librarians with active committees feel that the input obtained has been mostly constructive. But some regional librarians, who serve primarily as coordinators, wonder whether consumers might have more effective impact directly on subregional or public libraries. There is some feeling that even without formal panels, adequate input and feedback are received through informal sources, such as articles written for newsletters or telephone calls.

Three very active programs involving consumers were identified. In one, heavy reliance on consumers' input was consistent with the state's goal of greater involvement of constituencies in services, and the stimulus of a very strong chapter of the National Federation of the Blind. Panel members had influenced decisions such as acquiring a variety of free-to-the-caller telephone services, purchasing a Kurzweil Reading Machine, and expanding recorded book reviews. In a second case,

Table 5-2

Consumer Input to Regional Libraries

Description of Input Type of Representation	Number of Libraries with this kind of input Advisory Board*
1. FORMAL CONSUMER ADVISORY BOARD TO REGIONAL LIBRARY	7
Elderly members	1
Handicapped members	1
Blind members	7
Parents of learning disabled	1
Blindness or disability group advocates	2
Membership includes advocates of aging people	1
2. STATE OR PUBLIC LIBRARY BOARD PROVIDES INPUT TO NLS/BPH SERVICES	2
3. NO FORMAL ADVISORY BOARD	7
TOTAL *	16

*Multiple responses accepted.

the formation of an advisory panel around the issue of radio reading services involved members in other issues and resulted in the recruitment of volunteers. A third library described an advisory committee which had been functioning for about two years. Some details are presented as an illustration in Table 5-3.

Table 5-3

Characteristics of One Regional Library Consumer Advisory Committee

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A. CRITERIA OF PANEL SELECTION

Size:	The size had to be workable--about 10-12 people.
Geographic:	At least 4 of the 10 counties in the state had to be represented.
Membership:	Members were to be selected in proportion to the media use and to include the following disability groups: American Council of the Blind, Blinded Veterans Association, National Federation of the Blind, the Association of Physically Handicapped.

B. OPERATION AND IMPACT

Establishment:	The Library Advisory Committee meetings started by library staff explaining the function of the library and how it worked. They wanted the consumers to take this information back to their own constituencies and provide feedback.
Function:	The consumers now have input on the state collection and have recommended that it be current as well as retrospective. They give input to braille and cassette production of materials and on the future of those media. They review the standards of the American Library Association and goal statements for NLS/BPH Central.

C. FREQUENCY AND REMUNERATION

Meetings:	Committees meet four times a year.
Recompense:	Members are not paid, except travel expenses and a free lunch.

Remaining Issues Related to Improving Existing Service To Subscribers

1. To reduce needless circulation of materials to readers for scanning in the selection process, would it be feasible to develop recorded book reviews which might include excerpts of the book by the narrator?

   a. Could these reviews be organized to permit easy review by children, by readers preferring non-violent or non-offensive language as well as by readers requesting high interest, low vocabulary level materials?

   b. Might these recorded reviews also be made available to radio information services?

2. What agency systems for lending and training in use of equipment enhance machine use and maintenance?

3. Could machines be marked with instructions on how they are to be returned in the event a reader is no longer eligible for, interested in, or able to use the program?

4. On what basis should the size and content of braille collections be determined, given high costs of preparation and storage?

5. Should quidelines be developed for machine repair and for training programs on maintenance?

6. Should guidelines be developed for handling machine shortages and informing readers that shortages no longer exist?

7. What are the cost benefits of automating ordering and circulation systems? Are people actually reading more, or are materials just circulating more? What experiences from automated libraries can be shared with others considering automation?

a. What are the best systems for handling registration of readers and changes in their addresses or status?

b. What systems provide easy access to statistical data?

c. What are the advantages and disadvantages of librarians selecting materials for readers based on reader profiles as compared to responding to reader requests for specific materials?

d. Is there any difference between selection and distribution of books using Readers' Advisors versus automated systems based on readers' profiles? Which is preferable and for whom?

8. What are optimal ways in which systematic feedback may be regularly obtained from subscribers?

a. Should different methods of consumer input be encouraged at the regional and subregional levels?

b. What alternative ways of obtaining consumer input have been effective, for example, should panels of consumers of different disability types be more widely established, or should surveys be structured through the ordering system?

c. What functions can consumers perform, e.g., should they be encouraged to serve as volunteers? Should they initiate new program directions, or should they merely react to program information provided by librarians?

d. How best can representatives of disability advocacy groups as well as consumers themselves be encouraged to provide formal input?

e. Where and how should funding for soliciting consumer input be obtained?

f. How may experiences with consumer panels be shared on a continual basis?

CHAPTER 6

CONCLUSION

The motivation for this study was to explore factors of service delivery that might impact on reaching potential subscribers and upon their utilization of the National Library program. Shortages of equipment and specific titles resulting in delays in servicing subscribers are common, according to the regional librarians interviewed in this study. But of much greater significance is the need for materials and equipment designed specifically with the capabilities of persons with reading disabilities, especially the elderly. The most significant factor for expanding utilization is perceived as additional personal library services to: advise and orient subscribers, work with nursing home, school and hospital staffs, work on outreach to the physically handicapped and learning-disabled, and prepare materials supplementing the recorded and braille titles supplied by NLS/BPH.

We have not been wholly successful at identifying and assessing the relative import of factors like funding, staffing, organization, material shortages, and program objectives. This study has raised more questions than it has answered, many of which are included at the end of major sections in this report. Answers for the questions need to come from future research and from the implementation of guidelines that will, in part, provide operational standards for recording information. The American Library Association draft guidelines now being reviewed are a start on formally charting a way to examine the impact of resource inputs on utilization.

One of our main findings is that states have chosen unique methods and programs for distributing alternate reading materials to print produced by the NLS/BPH and others. It is mainly the total composite of these unique approaches that have made the difference in delivering reading services vital to the hundreds of thousands of persons across the country with disabilities in using regular print materials.

This report concludes by taking the many differences and similarities between regional libraries and grouping them into three major service models. These models are then examined in terms of possible strategies for expanding utilization within the existing framework of regional library services.

Table 6-1

Models of Regional Library
Services and Administration

Model I: Innovative

- A: Community Program Orientation
- B: Library Development Orientation

Model II: Traditional

- A: Personal Service Orientation
- B: Library Administration Orientation

Model III: Transitional or Troubled

MODEL I: INNOVATIVE REGIONAL LIBRARIES

These regional libraries share the following characteristics: (a) the quantity of services is growing, (b) their programs are fairly visible, and (c) library directors are comfortable and feel that services have adequate funding.

Community Program Orientation

Directors of these facilities are generally commited to outreach and volunteer programs. The library has developed a leadership role in community activities through innovative approaches for reaching the physically handicapped, nursing home residents, and other "hard-to-serve" groups. Consumer contact and feedback for a variety of services is encouraged by staff members. With local tape duplication and volunteer recordings, these libraries have obtained adequate supplies of materials. Librarians directing programs of this type often prepare and present their budgets. Support staff have the responsibility for management of specific programs.

Implications and Needs - The Community Program group is open to innovative change to expand readership and circulation. Because of their high community visibility, they are willing to experiment with multimedia to promote reading services (including Radio Information), to obtain user feedback, and to orient new users. These regional libraries serve as focal points of local and statewide activities for people who are disabled. They have either established or are seeking orientation and training programs for use with volunteers and local public librarians involved with NLS/BPH services. They see the need for information to support their varied activities and are concerned about the collecttion of data to assess the impact of their programs for future planning. Managing and monitoring programs with multiple sources of funding creates most of the difficulties for this type of library.

Library Development Orientation

These regional libraries are working on organization of subregional and automated systems for expediently handling subscriber registration, material selection, circulation and accountability. Many function as mini-National Library Service centers and see themselves as coordinators of library services. Their administrative skills include establishing automatic telephone services to record book orders or requests for machine repairs. These innovations are then adopted for use on the local level. Some directors of these libraries are presently facing a financial shortage, due to investments in computerization, but this is considered short-term. Volunteers are used to increase the availability of material: transcribing and duplicating braille, recording, and assisting in tape duplication. Staff often spend less time on direct outreach services or in regular contact with readers than in administration.

Implications and Needs - The Library Development group faces a tradeoff between effecting statewide efficiencies through coordination of local libraries, and becoming less visible to the public as a result. Subregional libraries in many of these states are becoming more responsive to consumers than are the regional libraries. For example, subregionals have consumer panels, walk-in services, and reference and referral activities. The regional library serves more as provider of materials and training, and as a statistical record center--allowing the local library to concentrate on direct services. Questions for exploration are whether such separation from the consumer is appropriate, and how feedback from subregionals and consumers should be organized.

MODEL II: TRADITIONAL REGIONAL LIBRARIES

These libraries work to offer good service along well-established lines. They are sometimes located in the smaller or less densely populated states. Their typical concerns are to improve the operation of existing services and keep up with identified needs of their readers.

Personal Service Orientation

Libraries with a personal service orientation put a priority on reader advisor services and personal contact (often by telephone) with their readers. This group of libraries has typically been quite heavily involved with the avid readers and with school children. They have long established ties to blindness agencies. On-site services are important, although not always as accessible (architecturally) as the director would like. Outreach is usually confined only to a geographic area near the library. Consumer involvement is frequent, although often it is either informal or obtained through representatives of agencies serving the handicapped. Volunteers are often used in recording, in backing-up administrative activities, and sometimes in outreach. Directors of these regional libraries have a variety of responsibilities: they offer direct services themselves as librarians, they do public speaking, they coordinate their programs and volunteers. Although many are not using automated systems, most are considering computerizing some aspects of their record-keeping and ordering and wish to explore the experiences of other regional library directors. Personal Service libraries are typically proud of their program, yet concerned about resources for expansion while wanting to maintain their personalized services.

Library Administration Orientation

This group is very similar to those oriented to library development, but the administrative libraries generally focus and conduct their activities on a smaller scale. Often the Library Administration group is tied to a state library handling print material. Typically, they serve primarily as "mail-order" operations, without emphasizing other programs. Directors see these regional libraries not as community centers, but as efficient providers of reading material. Onsite services are generally limited. Like the Personal Service group, they are trying to keep up with the numbers and demands of existing readers. Often they have a well-developed system for handling materials, mailings, and machine repair. They monitor service through extensive statistical reporting to further improve their systems. Volunteers may help produce materials, but they are less evident here than in the other models of regional library services. The directors have a firm grasp of library administration, but have fewer direct contacts with consumers.

Implications for Further Development - Some of these regional libraries need assistance in bringing consumer input to their programs and services. Consumer panels might also serve to make their library functions more visible. Many of these directors could become interested in problems of new or under-served readers if they could see what their needs are and how existing regional library systems could effectively be extended to serve them. The subregional library systems could effectively be extended to serve them. The subregional libraries might appropriately make other efforts to cultivate or reach out to new constituents on a personal level. This group of regional libraries may have knowledge of the procedures and systems needed by directors of the Personal Service group, who might in turn offer suggestions to the Library Administration group on recruitment and training of volunteers on materials production.

MODEL III: TROUBLED AND TRANSITIONAL

Two types of troubled and/or transitional libraries emerged: those going through substantial changes in administration or structuring, and those in serious financial difficulty. Both were so pressed by present problems that there was an identifiable lack of time for development or improvement of services to expand readership and circulation. In fact, several noted that they had severely cut back programs, (particularly outreach) and were worried about the services to one or more sub-groups. For example, in all cases, these librarians had limited their speaking engagements and other promotional efforts, and had problems in keeping up with new readers as well as maintaining statistics. Several directors were frustrated by their apparent lack of personal control over the situation. Although these directors felt that they had a responsibility to continue services to readers, they saw no relief from administrative pressures and constraints.

Implications and Needs - These troubled and transitional libraries need assistance with immediate problem solving. Directors do not feel that there are sources of consultation specifically for their needs. Moreover, they are somewhat reticent about speaking openly about their financial problems. The burden of present problems may preclude planning, introducing new services, or improving existing programs. Assistance in planning is an area where added attention would be helpful.

In sum, these models are presented as interpretive tools for working through changes within existing regional library services.

APPENDICES

Appendix A

Public Law 89-522
89th Congress, S. 3092
July 30, 1966

AN ACT

"To amend the Acts of March 3, 1931, and October 9, 1962, relating to the furnishing of books and other materials to the blind so as to authorize the furnishing of such books and other materials to other handicapped persons.

"Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled, That the Act entitled 'An Act to provide books for the adult blind', approved March 3, 1931, as amended (2 U.S.C. 135a, 135b), is amended to read as follows:

'That there is authorized to be appropriated annually to the Library of Congress, in addition to appropriations otherwise made to said Library, such sums for expenditure under the direction of the Librarian of Congress as may be necessary to provide books published either in raised characters, on sound-reproduction recordings or in any other form, and for purchase, maintenance, and replacement of reproducers for such sound-reproduction recordings, for the use of the blind and for other physically handicapped residents of the United States, including the several States, Territories, insular possessions, and the District of Columbia, all of which books, recordings, and reproducers will remain the property of the Library of Congress but will be loaned to blind and to other physically handicapped readers certified by competent authority as unable to read normal printed material as a result of physical limitations, under regulations prescribed by the Librarian of Congress for this service. In the purchase of books in either raised characters or in sound-reproduction recordings the Librarian of Congress, without reference to the provisions of section 3709 of the Revised Statutes of the United States (41 U.S.C. 5), shall give preference to nonprofitmaking institutions or agencies whose activities are primarily concerned with the blind and with other physically handicapped persons, in all cases where the prices or bids submitted by such institutions or agencies are, by said Librarian, under all the circumstances and needs involved, determined to be fair and reasonable.

'Sec. 2. (a) The Librarian of Congress may contract or otherwise arrange with such public or other nonprofit libraries, agencies, or organizations as he may deem appropriate to serve as local or regional centers for the circulation of (1) books, recordings, and reproducers referred to in the first section of this Act, and (2) musical scores, instructional texts, and other specialized materials referred to in the Act of October 9, 1962, as amended (2 U.S.C. 135a-1), under such conditions and regulations as he may prescribe. In the lending of such books,recordings, reproducers, musical scores, instructional texts, and other specialized materials, preference shall at all times be given to the needs of the blind and of the other physically handicapped persons who have been honorably discharged from the Armed Forces of the United States.

'(b) There are authorized to be appropriated such sums as may be necessary to carry out the purposes of this section.'

Sec. 2. The Act entitled 'An Act to establish in the Library of Congress a library of musical scores and other instructional materials to further educational, vocational, and cultural opportunities in the field of music for blind persons', approved October 9, 1962 (2 U.S.C. 135a-1), is amended to read as follows: 'That (a) the Librarian of Congress shall establish and maintain a library of musical scores, instructional texts, and other specialized materials for the use of the blind and for other physically handicapped residents of the United States and its possessions in furthering their educational, vocational, and cultural opoortunities in the field of music. Such scores, texts, and materials shall be made available on a loan basis under regulations developed by the Librarian or his designee in consultation with persons, organizations, and agencies engaged in work for the blind and for other physically handicapped persons.

'(b) There are authorized to be appropriated such amounts as may be necessary to carry out the provisions of this Act."

Appendix B

ELIGIBILITY FOR LOAN OF NLS/BPH MATERIALS PREPARED WITH FEDERAL MONIES

The conditions of eligibility for use of materials prepared by NLS/BPH are set forward as follows from the *Federal Register*.*

> (b) *Eligibility Criteria*. (1) The following persons are eligible for such service:
>
> (i) Blind persons whose visual acuity, as determined by competent authority, is 20/200 or less in the better eye with correcting glasses, or whose widest diameter of visual field subtends an angular distance no greater than 20 degrees.
>
> (ii) Persons whose visual disability, with correction and regardless of optical measurement, is certified by competent authority as preventing the reading of standard printed material.
>
> (iii) Persons certified by competent authority as unable to read or unable to use standard printed material as a result of physical limitations.
>
> (iv) Persons certified by competent authority as having a reading disability resulting from organic dysfunction and of sufficient severity to prevent their reading printed material in a normal manner.
>
> (2) In connection with eligibility for loan services "competent authority" is defined as follows:
>
> (i) In cases of blindness, visual disability, or physical limitations "competent authority" is defined to include doctors of medicine, ophthalmologists, optometrists, registered nurses, therapists, professional staff of hospitals, institutions, and public or welfare agencies (e.g., social workers, case workers, counselors, home teachers, and superintendents). In the absence of any of these, certification may be made by professional librarians or by any person whose competence under specific circumstances is acceptable to the Library of Congress.
>
> (ii) In the case of reading disability from organic dysfunction, competent authority is defined as doctors of medicine who may consult with colleagues in associated disciplines.
>
> (c) *Loans through regional libraries*. Sound reproducers are lent to individuals and appropriate centers through agencies, libraries, and other organizations designated by the Librarian of Congress to service specific geographic areas, to certify

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[illegible]c. 701.10 "Loans of library materials for blind and other physically handicapped persons." In Federal Register 39, No. 111 (1974): 20203-20204.

eligibility of prospective readers, and to arrange for maintenance and repair of reproducers. Libraries designated by the Librarian of Congress serve as local or regional centers for the direct loan of such books, reproducers, or other specialized material to eligible readers in specific geographic areas. They share in the certification of prospective readers, and utilize all available channels of communication to acquaint the public within their jurisdiction with all aspects of the program.

(d) National collections. The Librarian of Congress through the Division for the Blind and Physically Handicapped, defines regions and determines the need for new regional libraries and deposit collections in cooperation with other libraries or agencies whose activities are primarily concerned with the blind or physically handicapped. The National Collections located in the Division for the Blind and Physically Handicapped serve as one such regional center, and provide services to other libraries, and to blind and physically handicapped readers anywhere in the nation requiring specialized materials. It serves as the center from which books, recordings, sound reproducers, and other specialized materials are lent to eligible blind and physically handicapped readers who may be temporarily domiciled outside the jurisdictions enumerated by the act.

(e) Institutions. The reading materials and sound reproducers for the use of the blind and physically handicapped may be loaned to individuals who qualify, to schools for the blind or otherwise handicapped, and to institutions for the use of such persons only. The reading materials and sound reproducers may also be used in public or private schools; however, the individual students who qualify must be the direct and only recipients of the materials and equipment.

(f) Musical scores. The Division also maintains a library of musical scores, instructional texts, and other specialized materials for the use of the blind and other physically handicapped residents of the United States and its possessions in furthering their educational, vocational, and cultural opportunities in the field of music. Such scores, texts, and materials are made available on a loan basis under regulations developed by the Librarian of Congress in consultation with persons, organizations, and agencies engaged in work for the blind and for other physically handicapped persons.

(g) Veterans. In the lending of such books, recordings, reproducers, musical scores, instructional texts, and other specialized materials, preference shall be at all times given to the needs of the blind and other physically handicapped persons who have been honorably discharged from the Armed Forces of the United States.

GLOSSARY

ACCESSORIES - Equipment such as headphones, remote or speed control devices.
ACQUISITION - A thing acquired or gained, usually reading materials.
ALA - American Library Association.

BBR - see *Braille Book Review*.
BIBLIOGRAPHIC CONTROL - Descriptive record of a title and the number of extant copies.
BRAILLE - A system of printing or transcribing for the blind devised by Louis Braille in which the characters are represented by raised dots. It is graded (i.e., Grade 1, 1½, 2 and 3) according to the number of contractions used. Standard English Grade 2 braille has been adopted as the universal English language braille form; Grade 1 is useful for individuals not wishing or able to learn the standard braille code; Grade 1½ is an obsolete form which enjoyed great popularity at the turn of the century; Jumbo Braille is large braille useful for individuals whose tactile abilities are deficient.
BRAILLE BOOK REVIEW (BBR) - A bimonthly publication of NLS/BPH which gives information on the braille and general program of the NLS/BPH, and provides an annotated bibliography of mass-produced braille titles released during a two-month period. Lists volunteer-produced braille titles, as space permits.

CATALOG - A list of books arranged according to some definite plan which records, describes and indexes the resources of a collection, a library or a group of libraries. As used in this document, it is indexed by author, title and subject(s).
CONTAINER - A unit of circulation, e.g., recorded titles are circulated in containers.
COPYRIGHT - The exclusive privilege of publishing, reproducing and selling a work, granted by a government to an author, composer, etc.
COPYRIGHT CLEARANCE - Waiver of copyright restrictions in authorized circumstances.
CRITERION - A standard on which a decision or judgement may be based.

DBPH - see LC/DBPH.
DEPOSIT COLLECTION - A collection of material and the equipment upon which to play it, furnished by a network library to an institution with a number of eligible users, such as a nursing home, a convalescent center, or a hospital.

LARGE PRINT - Material printed in 14 point or larger type.
LC/DBPH - Library of Congress Division for the Blind and Physically Handicapped; former designation of National Library Service for the Blind and Physically Handicapped.

LOW-VISION DEVICES - Equipment specially developed to enhance visual capability of persons who have partial sight: for example, closed circuit television magnification systems, telescopes, monoculars, magnifying glasses.

MACHINE - Play-back equipment for Talking Books on discs or cassettes.
MACHINE-LENDING AGENCY - An agency designated by NLS/BPH to receive, issue, and control the inventory of specially designed record players, cassette machines, and accessories essential in the provision of service. These agencies may or may not be separate from the regional library.
MASTER - The original from which copies are reproduced.
MATERIAL - A collective term for books, magazines, pamphlets, etc., in any reading format.
MOON - An obsolete system of printing for the blind devised by Dr William Moon, which used stylized raised characters based upon the Roman alphabet.
MULTISTATE CENTER - An agency operating under a contractual agreement with NLS/BPH to provide backup support services to regional libraries and machine-lending agencies in an assigned portion of the network.

NARRATOR - A person who reads into a microphone to record material on magnetic tape.
NATIONAL LIBRARY SERVICE FOR THE BLIND AND PHYSICALLY HANDICAPPED (NLS/BPH) - A service funded by the U.S. Library of Congress to provide special free reading services (Talking Books, braille, and associated equipment) to eligible visually and physically handicapped people.
NETWORK - The agencies cooperating in the provision of library services to the blind and physically handicapped users throughout the United States. Included are NLS/BPH, regional and subregional libraries, machine-lending agencies, and multistate centers.

OPEN-REEL - Reel-to-reel tapes, as opposed to the quick-loading types such as cassettes.
OUTREACH - Library services delivered outside library buildings.

RADIO READING SERVICE (RADIO INFORMATION SERVICE) - Utilization of radio stations to transmit printed materials which are not available to the persons unable to use conventional print. Usually this service is provided through the utilization of Subsidiary Communications Authorization (S.C.A.).
REGIONAL LIBRARY - A library designated by NLS/BPH to provide library services to the residents of a specific geographic area, most often a state.

SELECTION - A book title chosen to fill a user's request, or a substitute sent to keep a user supplied with books if none of the specific requests are available at the time books are returned to the library. The latter service is given with the permission of the user.

STANDARD - Something that is established by authority, custom or general consent as a model or example to be followed. Definite level or degree of quality that is proper and adequate for a specific purpose.

STORAGE AREA - That portion of the total floor space of the library allocated to the storage of materials, supplies, and equipment not in immediate use.

SUBMASTER - First copy of a master tape, used to duplicate circulating copies.

SUBREGIONAL LIBRARY - A library designated by a regional library, with the approval of NLS/BPH, to provide service to the residents of a specified area of the regional library's total service area.

TALKING BOOK - Print material recorded on disc, magnetic tape, or cassette format, and produced or procured for the network, or a network library. Talking Book records are now recorded at 8 1/3 RPM.

TALKING BOOK TOPICS (*TBT*) - A bimonthly publication of NLS/BPH, giving information on the general and recorded program of the Talking Book Program, and providing an annotated listing of mass-produced disc and cassette titles released during a 2-month period.

THERMOFORM - A heat-vacuum procedure for duplicating pages of braille.

TITLE - The distinguishing name of a written, printed, or spoken work, used for the term "book" in general, as distinguished from a variable number of copies of a book or a magazine.

TRANSCRIBER - A person engaged in making a braille copy of printed material.

WATS - Wide Area Telephone Service with a designated toll-free number, and separate lines for in and out calls.

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